



New Leaf Behavioral Health

a nonprofit mental health organization

Gifts of Publicly-traded Securities Office of Development

Thank you for your interest in making a gift of securities to the New Leaf Behavioral Health (NLBH). Please share these instructions with your broker to help facilitate your gift and contact the Office of Gift Services with any questions.

If the securities are held electronically:

Your bank or broker may transfer stock to NLBH's brokerage account with the information below (Contact us for the Information at development@nlbh.org)

Brokerage:

Account Name:

Account Number:

DTC Number:

Bank Contact #:

It is important that the bank or broker contact the Office of Development in order for us to identify the transfer in a timely and accurate manner. ***What information is helpful?*** To help us correctly identify, value and receipt your gift in a timely manner, the following information from you or your broker is important.

- Donor's name
- Stock information (number of shares, name of stock and symbol)
- Originating broker
- Designation of gift, if known

If you hold the securities in certificate form:

Please send by first-class mail or hand deliver the ***unendorsed*** certificate(s) along with a letter of transmittal which includes your name, address and where you want the gift designated.

In a separate envelope, mail to the same address a copy of the transmittal letter along with a ***stock power executed in blank*** for each stock certificate you are donating. You should sign one stock power for each stock certificate and have your signature guaranteed by a bank officer. The bank officer should **not** date the signature guarantee.

If you prefer to have your certificate re-registered:

The shares that you wish to donate to NLBH should be registered to "New Leaf Behavioral Health." The tax identification number is 32-0204218.

For assistance with a transfer or for more information, please contact:

Edward M. Binanay, *Director of Development*

direct phone: 919-523-1547

email: development@nlbh.org