

Procedure for Contributing Securities

Gifts of appreciated securities are a convenient and tax efficient way to support Palliative & Supportive Care of Nantucket (PASCON), especially since your broker or custodian may transfer securities electronically into the PASCON account. It is our policy to sell contributed securities and have the proceeds sent to our office by our broker. We do not hold the stock certificates or securities.

Please note that it is **extremely important for you or your agent to notify our office directly of your gift** as transferred securities arrive with no identifying information. In order to properly process and acknowledge your contribution, we ask that you call, email, or write to us with the following information:

- Date of gift
- Donor name and address
- Name of security and numbers of shares
- Your transfer agent's name, address, and telephone number

In accordance with IRS guidelines, the date of your gift will be considered the date that PASCON assumes ownership of the shares. For crediting purposes, the value is determined as the average of the high and low listings on the date the stock is gifted.

Electronic Transfers: the most expeditious way of sending securities to PASCON. Brokers prefer electronic transfers. Your broker or agent will need the following information:

- Receiving Brokerage: Morgan Stanley
- DTC Number: 0015
- Contact: **Mike Powell**, Senior Vice President
Morgan Stanley Wealth Management
28 State St., 27th Floor
Boston, MA 02109
mike.powell@morganstanley.com
(617) 570-9523
- Account Name: Palliative & Supportive Care of Nantucket Foundation
- Account Number: 707-131794-366

To donate mutual fund shares, please contact the broker listed above to initiate the transfer.

If your broker or custodian has sold securities on behalf of PASCON, the proceeds of the sale should be sent to PASCON:

PASCON
57 Prospect St
Nantucket MA 02554

If you have any questions, please call our office at 508-825-8325 or email Ginnie Faria, vfaria@partners.org.

Please note that our mailing address is PASCON, 57 Prospect Street, Nantucket, MA 02554, but our physical address is temporarily located at 99 Goldfinch Drive during the hospital construction.

Thank you for your support!