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**The Judy Whinfrey Scholarship Fund for Nursing Education****About the Fund**

The Judy Whinfrey Scholarship Fund for Nursing Education has been established in memory of Judy Whinfrey, a dedicated Central DuPage Hospital board member and employee of Hewitt Associates. The fund will provide educational scholarships for nursing studies to undergraduate and graduate students. Contributions to the fund should be directed to CDH Foundation.

**Donating Securities**

Donating appreciated securities can be a very tax-wise way to make an important charitable gift. Central DuPage Health Foundation gratefully accepts gifts of stocks, bonds, and other publicly traded securities. When making a gift of securities, we strongly encourage you to seek the professional guidance of your financial, and/or legal advisors.

**Instructions**

**Please follow the attached detailed instructions to make a gift of securities from your brokerage account or when they are held in certificate form.**

**Before making your gift, please contact the CDH Foundation (contact details provided below) and provide the following information via telephone, fax or e-mail.**

**Donor Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Gift Information**

Planned Date of Transfer: \_\_\_\_\_

# of Shares being Transferred: \_\_\_\_\_

Name of Securities being Transferred: \_\_\_\_\_

Purpose of Gift: *Benefit The Judy Whinfrey Scholarship Fund for Nursing Education****Please Provide Advance Notification to:****Cathy Krolczyk at (630) 933-4483 or via e-mail at: [Cathy\\_Krolczyk@cdh.org](mailto:Cathy_Krolczyk@cdh.org).***Thank you for your important gift!**

CDH Foundation is a recognized 501(c)(3) Nonprofit Organization

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## **I. Gifting Stocks or Bonds Held in a Brokerage Account**

- Securities held in a brokerage account may be transferred electronically into the Foundation's brokerage account by Depository Trust Corporation (DTC) wire transfer.
- Please work closely with your broker to ensure that you allow sufficient processing time (especially near the end of the tax year) when initiating a DTC wire transfer. Have your broker transfer the securities to the Central DuPage Health Foundation by providing him/her with the following information:

Foundation's Broker:	Larry Ekstrom (Morgan Stanley), 847-382-6610 Anne Butcher (Morgan Stanley), 847-382-6611
Account Name:	Central DuPage Health Foundation
Federal Tax ID #:	36-4401289
Client Account #:	246-12483-18-304
Smith Barney's DTC #:	0418

- **Please notify the Central DuPage Health Foundation in advance** when making a gift of securities (see contact information below). It is helpful to know the planned date of your gift, the name(s) of the securities being donated, the number of shares being transferred, and how you would like your gift to be used.

## **II. Gifting Stocks or Bonds Held in Certificate Form**

- **If you are in possession of actual ownership certificates**, you may either send or bring them directly to the Central DuPage Health Foundation at the address below. **In all cases involving certificates**, a standard **Security Release** form (available from the Foundation or your broker) must be completed and submitted along with the certificates to authorize the release of the securities into the Foundation's brokerage account.
- **If you choose to bring the certificates to the Foundation in person**, please first contact our office to meet with a Foundation representative, deliver the certificates, complete a **Security Release** form and sign the certificates at the time of your visit. (Please do not sign your certificates in advance.)
- **If you choose to mail the certificates to the Foundation**, please place the **unsigned** certificate(s) and a **signed Security Release** form in an envelope along with a brief note indicating how you would like your gift to be used. In a **separate envelope**, place an **Irrevocable Stock or Bond Power form**, (available from the Foundation or your broker) signed in the presence of a bank officer or registered broker, as your signature guarantee. Please mail the two envelopes to the Foundation. The Foundation will contact you upon receipt of the documents and provide all other necessary information.

*For questions or additional information, please contact:  
Cathy Krolczyk at (630) 933-4483 or via e-mail at: [Cathy\\_Krolczyk@cdh.org](mailto:Cathy_Krolczyk@cdh.org).*

**Thank you for your important gift!**

CDH Foundation • 27W353 Jewell Road • Winfield, IL 60190 • [www.CDHealthFoundation.org](http://www.CDHealthFoundation.org)  
Phone: 630-933-GIVE (4483) • FAX: 630-933-1883 • TTY for the hearing impaired 630-933-4833