

Middlesex Health Stock Transfer Instructions

Thank you for inquiring as to how to make a gift of stock to Middlesex Health. Securities held in a brokerage account may be transferred electronically into Middlesex Health's account at Principal Financial Group.

Please provide your broker with the following information:

DTC Instructions:

- **Participant #:** 2925
- **Agent Bank ID #:** 78861
- **Principal Account #:** 25997700, Middlesex Hospital Endowment Fund

Wire Instructions:

- **Bank:** Wells Fargo Bank
- **ABA:** 121 000 248
- **Acct Name:** Principal Bank PCS Incoming Wire or ACH
- **Acct#:** 4516058948
- **FFC:** 25997700 / Middlesex Hospital Endowment Fund

Our representative at Principal Financial Group:

Brittnee Rice, Client Service Specialist II

(254) 265-6198

PCSTexasCSC@Principal.com

When making your gift, it is very important to notify the Philanthropy Office in advance with the following information: your name, address, and the name of the security and number of shares you are contributing. This is because when shares are transferred broker to broker, only the stock name and the number of shares are communicated, and not the donor's name. Advance notice enables us to immediately identify your stock as a gift from you and acknowledge your generosity for tax purposes.

**Please note: While our brand is now Middlesex Health, our legal name remains Middlesex Hospital.*

Sally Ann Lee

sallyann.lee@midhosp.org

Direct line – 860-358-4065

Fax – 860-358-6568

Revised July 2023