

Benedictine Resources copy

Transfer Instructions

Stock Transfer - via DTC

Merrill Lynch

DTC #8862

For Further Credit to Account #672-74H01

N/O: Benedictine Health System Foundation (This name will need to become Benedictine Foundation in a few months)

The associated foundation to benefit from this gift is _____ (Please create a drop-down listing of communities)

Questions: Call or write Brenda at 763-689-6108, Brenda.Strom@benedictineliving.org

Cash - via Fed Wire

Bank of America N.A.

100 West 33rd Street

New York, NY 10001

ABA Number: **026009593**

Account Number: **6550113516**

Name: **Merrill Lynch Pierce Fenner and Smith, New York, NY**

Reference: Merrill Lynch 8-digit account number and account title: **67274H01, BHSF-DEPOSIT ACCOUNT**

The associated foundation to benefit from this gift is _____ (Please create a drop-down listing of communities)

Questions: Call or write Brenda at 763-689-6108, Brenda.Strom@benedictineliving.org

Endowment

PERMANENTLY RESTRICTED GIFTS

Permanently restricted gifts are designated for a specific purpose by the donor to be held and invested by the Foundation in perpetuity, with the use limited to a percentage of the fund balance as designated by the donor or as set by the Foundation Board. Typically, these gifts are endowment funds, which are permanently invested to provide income for the long term benefit of BHS and its affiliates. Generally, subject to local State tax law, a minimum gift of \$25,000 is required to create a named endowed fund. The long-term intent is to sustain the principal that is contributed as a permanent asset to support the donor's desired purpose.

Donors may direct endowment gifts to a particular area of health care and/or a particular location where BHS provides health care. Should the donor's desired purpose cease to exist, the gift will be connected with another appropriate entity as determined by the Foundation Board, in consultation with appropriate physicians, administrators, and the donors or their descendants. On a case-by-case basis, or in a particular campaign to build its endowment, the Foundation may accept endowment gifts for more specific purposes.

Gift Acceptance Policies

(Attached File)