

Making a Gift from Bank and Brokerage Accounts

You can achieve a charitable goal by naming an Advocate hospital or program as the beneficiary of your bank or brokerage accounts. You will maintain complete control over the assets while living. If you need the funds, they are available to you. If not, you have made a wonderful contribution to support our health care mission at the hospital.

Making a charitable gift from your bank or brokerage accounts can be easy. Your bank or brokerage firm should be able to supply you with a beneficiary designation form for your accounts. A "Payable on Death" form is used for your bank accounts and a "Transfer on Death" form for your brokerage accounts. Both forms offer a quick means of asset disbursement, as both avoid the probate process.

Advocate Charitable Foundation accepts gifts on behalf of all Advocate hospitals and programs. You can designate either Advocate Charitable Foundation or the name of the hospital on the beneficiary form. Please notify the Foundation of your designation and what particular hospital or program you want to support.

The following information may be helpful in completing the beneficiary designation form:

- **Tax ID number:** 36-3297360
- **Mailing Address:** **Office of Gift Planning**
Advocate Charitable Foundations
2025 Windsor Drive
Oak Brook, IL 60523
- **Phone:** 630-379-3729

For more information:

John Holmberg, CFP®
Vice President, Gift Planning

630-379-3729
john.holmberg@aah.org

Office of Gift Planning
Advocate Charitable Foundation
2025 Windsor Drive
Oak Brook, IL 60523

aah.org/foundations

Tax ID: 36-3297360