



**Lee Memorial Health System Foundation
Gift Acceptance Policy and Guidelines for Publicly Traded Securities**

Lee Memorial Health System Foundation accepts gifts of publicly traded securities, including stocks, bonds and mutual funds. These types of gifts may be transferred electronically or delivered in certificate form. It is the Foundation's general policy for all publicly traded securities to be sold upon receipt.

To receive prompt credit for your gift to the Lee Memorial Health System Foundation, please contact Linda Kelly, Senior Director of Development & Major Gifts for the Foundation, at (239) 343-6064 or email her at: linda.kelly@leememorial.org with the following information:

- Your intent to make a gift to the Lee Memorial Health System Foundation for the benefit of the Lee Memorial Health System- We will need a letter or email indicating what you wish your gift to support.
- The estimated transfer date
- The name of your securities firm
- The name and contact information of your broker
- The name of your stock and number of shares to be transferred
- The intended purpose of your gift

If you need further assistance in making your gift, please call one of the individuals below:

Name	Area of Service	Address	Phone/Fax/Email
Linda Kelly	Senior Director of Development & Major Gifts	16451 HealthPark Commons Dr. Suite 200 Fort Myers, FL 33908	(239) 343-6064 (239) 343-6991 Linda.Kelly@leememorial.org
Ken Shoriak	System Director of Foundation Operations	16451 HealthPark Commons Dr. Suite 200 Fort Myers, FL 33908	(239) 343-6053 (239) 343-6991 Ken.Shoriak@leememorial.org
Shelley Hughes	Asst. to the Foundation Board	16451 HealthPark Commons Dr. Suite 200 Fort Myers, FL 33908	(239) 343-6151 (239) 343-6991 Shelley.Hughes@leememorial.org