



BHFI Tax ID # 52-1296840

Below is the information you will need to transfer a gift of stock to BRC Foundation. It is helpful if you call the Foundation Office at 540-828-2652 prior to transferring so we are expecting it.

TYPE OF GIFT	INSTRUCTIONS
ACATS and DTC Eligible Securities (Stocks, Bonds, ETFs)	Participant #2039 SEI Private Trust Co FFC Truist Bank, 7938702, BRIDGEWATER HLTHCARE FDN-CATAWBA CU , Donor Name and Purpose
Fed Securities	FED: ABA #042000013 US Bank NA/1050 Account 001050985490 FFC Truist Bank Truist 7938702; BRIDGEWATER HLTHCARE FDN-CATAWBA CU Donor Name:
Global Securities	Contact TruistBankGiftClearing@Truist.com for global delivery instructions.
Mutual Funds	**It is important to notify Truist of incoming mutual fund gifts as soon as possible. Some mutual funds can be delivered via ACATS. If the delivering firm participates in ACATS, please attempt delivery via ACATS, using the DTC Eligible Securities instructions above. For ACAT rejects and non-ACAT participating delivery firms and funds, a manual mutual fund transfer is required. <i>Manual transfers may take up to 10 business days.</i> Contact TruistBankGiftClearing@Truist.com for manual mutual fund delivery instructions, which will include a fund account number or BIN. When submitting the request to the fund company, include FFC Truist 7938702, BRIDGEWATER HLTHCARE FDN-CATAWBA CU , Donor Name, and Purpose.
Physical Securities	Truist Bank Physical Custody, Mail Code 803-05-15-10 303 Peachtree Street, N.E. 15 th Floor, Suite 1520 Atlanta, GA 30308 *Reference Truist 7938702; BRIDGEWATER HLTHCARE FDN-CATAWBA CU on the documentation accompanying the stock certificate (s)
Check Instructions	Contact a member of your Client Service Team for instructions.
Wiring Instructions for gifts inside US	Bank Name..... Truist ABA Routing/Transit Number..... 053101121 Account Number..... 5177620228015 Account Name..... ST DEP-DMS FFC Trust Account Name..... [BRIDGEWATER HLTHCARE FDN-CATAWBA CU] FFC Trust Account Number..... [7938702]
Wiring Instructions for gifts outside US Add	SWIFT Code..... BRBTUS33

Contact	Phone number
Dawnee Morgan (Primary)	404-230-5430
Janel Liddelow-Johnson (Secondary)	404-230-5076
Dawn Keevill-Carey (Back Up)	404-588-8296
TruistBankGiftClearing@Truist.com Please allow 24 hours for the Gift Clearing Team to respond to inquiries via email or voicemail.	

Additional Information -

BRC does have an account with Wells Fargo Securities as follows:

Account #1784-7381: DTC # 0141

Ed Sipe, Assistant - Carol Burke (540-434-9926)

Annie Frazier, VP for Development and Community Relations

Afrazier@brcliving.org

540-828-2509

Updated: 10/2026