

Sutter Health Philanthropy: Local Tax IDs and Stock Gift Instructions



How to Donate Stock

1. Electronic Transfers

- **Process:** Inform your broker of the stock or securities name and the number of shares to transfer.
- **Brokerage Details:** Include the Sutter Health foundation's name and brokerage account details.
- **Tax Details:** The gift date will be recorded as the date shares enter our account.
- **Notification:** Notify your foundation's contact to ensure proper tracking.

2. Stock Certificate Donations

- **Mail Instructions:** Send certificates via registered mail to your foundation's broker.
- **Stock Power:** [Sign a separate stock power document](#) without completing other sections. Mail it in a separate envelope.
- **Cover Letter:** Include designation details, foundation name, and account number.

Sutter Health Affiliates and Tax IDs

Philanthropic Organization	Tax ID	Contact Information	Brokerage Account
Sutter Health	94-2788907	PO Box 160045, Sacramento, CA 95816 (916) 286-6826 philanthropy@sutterhealth.org www.sutterhealth.org/giving	UBS Financial Services
Alta Bates Summit Medical Center	94-0562680	3012 Summit Street, 6th Floor C-Wing, Oakland, CA 94609 Maureen Smith (510) 204-2957 Maureen.Smith@sutterhealth.org	UBS Financial Services
California Pacific Medical Center (CPMC) Foundation	94-2728423	2015 Steiner Street, San Francisco, CA 94115 (415) 600-4400 Vanessa Tan (415) 646-1263 Vanessa.Tan@sutterhealth.org	UBS Financial Services

Philanthropic Organization	Tax ID	Contact Information	Brokerage Account
Eden Medical Center	94-0562680	20103 Lake Chabot Road, Castro Valley, CA 94546 Shannon Brady (650) 853-4808 Shannon.Brady@sutterhealth.org	UBS Financial Services
Memorial Medical Center	94-2290244	1700 Coffee Rd, Modesto, CA 95355 Mail: PO Box 160045, Sacramento, CA 95816 Jana Rhine (209) 530-3600 Jana.Rhine@sutterhealth.org	UBS Financial Services
Memorial Hospital Los Banos	94-1156621	520 West I Street, Los Banos, CA 93635 Mail: PO Box 160045, Sacramento, CA 95816 (209) 826-0591 ext. 50276	UBS Financial Services
Mills-Peninsula Hospital Foundation	23-7288765	1501 Trousdale Drive, Burlingame, CA 94010 Amanda Martin (650) 696-5990 Amanda.Martin@sutterhealth.org	Merrill Lynch - Mills-Peninsula Hospital Foundation Account
Novato Community Hospital	94-0562680	180 Rowland Way, Novato, CA 94945 Ryan Pocock (707) 322-3874 Ryan.Pocock@sutterhealth.org	UBS Financial Services
Palo Alto Medical Foundation	94-1156581	795 El Camino Real, Palo Alto, CA 94301 Shannon Brady (650) 853-4808 Shannon.Brady@sutterhealth.org	Morgan Stanley Palo Alto
Sutter Amador Hospital Foundation	94-1156621	200 Mission Blvd, Jackson, CA 95642 Mail: PO Box 160045, Sacramento, CA 95816 Jody Boetzer (209) 257-7619 Jody.Boetzer@sutterhealth.org	UBS Financial Services
Sutter Auburn Faith Hospital Foundation	94-2594966	11815 Education Street, Auburn, CA 95602 Mail: PO Box 160045, Sacramento, CA 95816 Suzanne Zolfo (916) 767-2015 Suzanne.Zolfo@sutterhealth.org	UBS Financial Services

Philanthropic Organization	Tax ID	Contact Information	Brokerage Account
Sutter Care at Home (SCAH)	94-6068843	PO Box 160045, Sacramento, CA 95816 Melissa Cohea (916) 286-8448 Melissa.Cohea@sutterhealth.org	UBS Financial Services
Sutter Davis Hospital Foundation	68-0217870	2000 Sutter Place, Davis, CA 95616 Mail: PO Box 160045, Sacramento, CA 95816 Antoinette Vojtech (916) 286-8448 Antoinette.Vojtech@sutterhealth.org	UBS Financial Services
Sutter Delta Medical Center	94-0562680	3012 Summit Street, 6th Floor C-Wing, Oakland, CA 94609 Maureen Smith (510) 204-1667 Maureen.Smith@sutterhealth.org	UBS Financial Services
Sutter East Bay Medical Foundation	94-0562680	3012 Summit Street, 6th Floor C-Wing, Oakland, CA 94609 Maureen Smith (510) 204-1667 Maureen.Smith@sutterhealth.org	UBS Financial Services
Sutter Gould Medical Foundation	68-0273974	1329 Spanos Court, Suite C-2, Modesto, CA 95355 Mail: PO Box 160045, Sacramento, CA 95816 Suzanne Zolfo (916) 767-2015 Suzanne.Zolfo@sutterhealth.org	UBS Financial Services
Sutter Lakeside Hospital	94-0562680	5176 Hill Road East, Lakeport, CA 95453 Morgen Jarus (707) 262-5121 Morgen.Jarus@sutterhealth.org	UBS Financial Services
Sutter Medical Center Foundation	94-2788906	2800 L Street, Suite 420, Sacramento, CA 95816 Mail: PO Box 160045, Sacramento, CA 95816 Antoinette Vojtech (916) 887-4481 Antoinette Vojtech@sutterhealth.org	UBS Financial Services

Philanthropic Organization	Tax ID	Contact Information	Brokerage Account
Sutter Medical Foundation	68-0273974	PO Box 160045, Sacramento, CA 95816 Suzanne Zolfo (916) 767-2015 Suzanne.Zolfo@sutterhealth.org	UBS Financial Services
Sutter Roseville Medical Center Foundation	68-0040113	1 Medical Plaza Drive, Roseville, CA 95661 Mail: PO Box 160045, Sacramento, CA 95816 Suzanne Zolfo (916) 767-2015 Suzanne.Zolfo@sutterhealth.org	UBS Financial Services
Sutter Sansum Clinic	95-6419205	P.O. Box 1200, Santa Barbara, CA 93102-1200 Dru Hartley (805) 681.7726 Dru.Hartley@sutterhealth.org	Merrill Lynch – Sansum Clinic Account
Sutter Santa Rosa Regional Hospital Foundation	94-0562680	30 Mark West Springs Road, Santa Rosa, CA 95403 Lisa Amador (707) 576-4697 Lisa.Amador@sutterhealth.org	UBS Financial Services
Sutter Solano Medical Center Foundation	94-2788906	300 Hospital Drive, Vallejo, CA 94589 Mail: PO Box 160045, Sacramento, CA 95816 (707) 864-4668	UBS Financial Services
Tracy Hospital Foundation	68-0318845	1420 North Tracy Blvd, Tracy, CA 95376 Mail: PO Box 160045, Sacramento, CA 95816 (209) 832-6052	UBS Financial Services

Brokerage Contact Information

UBS Financial Services

- **Address:** 1610 Arden Way, Suite 200, Sacramento, CA 95815
- **Contact:** Michael Hardy, Senior VP, Investments
 - **Phone:** (916) 648-7244
 - **Email:** michael.e.hardy@ubs.com
- **Account Details:**
 - Account Number: SO 11184 (This is the letter “O” not the number zero)
 - DTC Number: 0221

Merrill Lynch Account (Mills-Peninsula Hospital Foundation)

- **Address:** 101 S. Ellsworth Avenue, 4th Floor, San Mateo, CA 94401
- **Contact:** Jason Ting, Managing Director
 - **Phone:** (650) 579-3023
- **Account Details:**
 - Account Number: 632-04018
 - DTC Number: 8862

Merrill Lynch Account (Sansum Clinic)

- **Securities Donations:**

Merrill Lynch Account Number: 228-04114
DTC Number: 8862
- **Wire Transfer – Cash Donations:**

Cash donations sent to Merrill Lynch via Wire Transfers or ACH Transfers by using the following wiring instructions:

Funds are routed through:
Bank of America, 100 W. 33rd Street, New York, NY
ABA #026009593
1st credit to Merrill Lynch account #6550113516
Further credit to Sansum Clinic account #228-04114

Morgan Stanley Palo Alto Medical Foundation

- **Address:** 245 Lytton Avenue, Suite 200, Palo Alto, CA 94301
- **Contact:** Alex Bianchi, Associate VP
 - **Phone:** (650) 853-4042
- **DTC Details:**
 - Palo Alto Division: 0015/112-097915-026
 - Camino Division: 0015/112-016010-026