

# Martha Jefferson Hospital Foundation

## GIFT OF SECURITIES

The Martha Jefferson Hospital Foundation encourages gifts of stocks, bonds, stock options and shares of mutual funds. A gift of appreciated securities -- stock worth more now than what you paid for it -- is a popular alternative to a cash gift because it actually has the potential to save taxes twice. You receive an income tax deduction for the full fair market value of your securities (if you've held the securities for more than one year), and you avoid capital gains tax on the appreciation. The fair market value is determined by the mean of the high and low sales prices on the date the stock is given to Martha Jefferson. Should appreciated securities be used to make a bequest, or to fund a charitable trust, gift annuity, or other planned-giving arrangement, you may realize substantial estate and gift tax benefits as well.

You may be eligible to claim an income tax charitable deduction of up to thirty-percent of your adjusted gross income for a gift of securities held for more than one year. As with gifts of cash, any deduction you cannot use in the year of your gift may be carried over and used for up to five additional years.

Stock gifts can be made to the Martha Jefferson Hospital through the Foundation using one of four methods:

**A Martha Jefferson account at your Brokerage** – Most local brokers have an account for Martha Jefferson that can expedite a transfer directly from your account to ours.

**Broker or Bank Transfer** – If your broker or bank does not have an account for Martha Jefferson, the fastest and most secure way for transferring stock is through the Depository Trust Company (DTC). **Please make the transfer to DTC #0141 (Wells Fargo Advisors) for credit to: A/C #5330-6800 (the account for Martha Jefferson Hospital).** Please notify the Foundation of the transfer by phone, e-mail or fax so we can be certain to recognize and acknowledge your gift in accordance with your wishes.

**Direct Transfer** – To donate a stock certificate that is in your name, please call our office for assistance at (434)654-8258. The Hospital's tax ID number is 54-0261840.

**Questions** – please contact Ray R. Mishler, Vice President, or Cathy A. Link, Director of Special Gifts at Martha Jefferson Hospital Foundation at (434)654-8258.

Martha Jefferson Hospital Foundation  
459 Locust Avenue  
Charlottesville, VA 22902  
(434)654-7316 fax  
(434)654-8258 or (434)654-8352 office phone

*Thank you for your generous support  
of Martha Jefferson Hospital !*

*Information provided is not intended to be tax or legal advice. Please consult a qualified  
financial advisor about the tax consequences of your gift.*

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