

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 saves 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 ownership of the stock is transferred 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.

Gifts of stocks and mutual funds in support of Martha Jefferson Hospital are coordinated by the Martha Jefferson Hospital Foundation using one of the following methods:

Electronic Securities Gift Transfer Instructions

1. Before making the transfer, please notify the Foundation at 434-654-8258 of the planned transfer (identity of securities is helpful) so arrangements can be made with the Hospital's broker to receive the stock. Please also advise us of the purpose for which you wish your gift to be directed, i.e. Nursing, Palliative Care, Caring Tradition, etc.
2. Depository Trust Company (DTC) is the clearinghouse for electronic security transfers and can be completed with the assistance of your broker.
3. Provide the following information to the transferring broker:

FOR DTC Eligible Securities:

Clearing Broker: Wells Fargo Advisors

DTC Participant #: 0141

Account Number: 5330-6800

Account Name: Martha Jefferson Hospital

Reference: [Donor Name(s)]

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 Mishler or Cathy Sedwick at the Martha Jefferson Hospital Foundation at (434) 654-8258.