

ANNE ARUNDEL MEDICAL CENTER FOUNDATION, INC.

Gifts of Stock

AAMC Foundation accepts gifts of stock, which may provide greater tax advantages for donors than gifts of cash. Donors receive a charitable gift tax deduction for the fair-market value of the stock and avoid capital gains tax on the transfer. Below are three ways to give securities to AAMC Foundation. For more information, please call the Foundation Office at 443-481-4747 or consult your accountant or financial advisor.

Transferring Stocks Electronically

- ❖ You may transfer stocks electronically through your bank, brokerage firm, trust company, or CAM & Associates.
- ❖ Before you transfer stock, please notify the Foundation of your intent to do so by calling the Foundation at 443-481-4747. Please provide the following information:
 - a. Your name
 - b. Designation of your gift
 - c. Name and phone number of your broker
 - d. Name of stock being transferred
- ❖ Please instruct your broker to transfer the stock to:
 - a. **CAM & Associates**
Kevin B. Collison, CFP®, Christopher J. Asher, CFP® & Scott G. McRoy, CFP®
One Park Place, Suite 350, Annapolis, MD 21401
www.fa.ml.com/CAM
Phone: (410) 263-0128 Fax: (866) 251-2943
 - b. Merrill Lynch Wealth Management via DTC: **5198**
 - c. Account # **707-02379** for credit to Anne Arundel Medical Center Foundation.

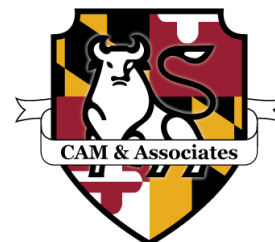
Delivering Stocks by Hand

- ❖ You may deliver stock certificate(s) to the Foundation Office at 2000 Medical Parkway, Belcher Pavilion, Suite 604, Annapolis, MD 21401. Alternatively, we can arrange to meet with you at your home or office to receive certificates.
- ❖ When you deliver, or we pick up, certificate(s), we will ask you (and any other donor(s) involved) to:
 - a. Endorse the certificate(s) in our presence; and
 - b. Sign a form, which we will notarize, releasing the certificate(s) to AAMC Foundation.

Delivering Stocks by Mail

- ❖ AAMC requires a separate stock power form for each certificate. Please sign the stock power(s) exactly as the name reads on the stock certificate. Do not fill in AAMC Foundation's name in the stock power(s). Stock power forms are available from the Foundation Office, or from your banker or broker.
- ❖ Please send the stock certificate(s) and the signed stock power(s) in separate envelopes. We recommend that the stock certificate(s) be sent by registered or certified mail, return receipt requested. The mailing address is AAMC Foundation, 2000 Medical Parkway, Belcher Pavilion, Suite 604, Annapolis, MD 21401.
- ❖ Please enclose a cover letter providing your name, address and telephone number along with any designated purpose for which the gift is being made.

Kevin B. Collison, CFP®, Christopher J. Asher, CFP® & Scott G. McRoy, CFP® of CAM & Associates, Merrill Lynch Wealth Management Advisors are available to answer any questions and assist you with this process. As well as help you balance your daily financial needs and plan for your long term goals.



One Park Place, Ste 350
Annapolis, Maryland 21037
410-263-0128
<http://fa.ml.com/cam>