



Ways to make a gift to **MedStar Health.**

Below are instructions on the different ways to partner with MedStar Health. If you have questions, or want to speak to a member of our team, please email philanthropy@medstar.net or call **410-772-6930**.

Give online

Visit [MedStarHealth.org/Philanthropy](https://www.MedStarHealth.org/Philanthropy) to make an online gift.

Give by phone

Call us at **410-772-6930**.

Give by mail, UPS, or FedEx

To make a gift by check, please make it payable to MedStar Health and send it with the entity designation and purpose to:

MedStar Health
Office of Philanthropy
10980 Grantchester Way, 7th Floor
Columbia, MD 21044

Note: For calendar year tax credit, gifts sent by USPS must be postmarked by Dec. 31 and gifts sent by FedEx or another courier must be received by Dec. 31.

Give stock or mutual funds

For stocks that have been held for a year or more and increased in value (appreciated), the key to receiving tax savings is to donate the shares directly to MedStar Health. You receive a double tax benefit by:

- Avoiding capital gains tax on the profit, and
- Receiving a full tax deduction for the fair market value of your gift

When making your gift of stock or mutual funds, please tell your brokerage to provide the following information with the transfer:

- Your name
- Name of the security to be transferred and number of shares to be transferred
- Name and contact information for the brokerage firm
- Purpose of gift or intended entity within MedStar Health

Note: Stocks or bonds are valued on the average of the high and low selling prices on the date of contribution, multiplied by the number of shares donated.

Key information to include:

- Depository Eligible Security (DTC) number: 2669
- Northern Trust Company
- Account number: 44-82990
- Account name: MedStar Health gift account
- Reference: donor name, MedStar Health institution, and the gift designation.

Mutual funds

Please do not establish an account at the mutual fund in the name of MedStar Health. Northern Trust will establish a shell account at the fund in the nominee name and provide you with the account number so that you may complete this transfer. Please contact Suah Siki, Account Manager, Northern Trust, at **szs48@ntrs.com** or **312-557-5771**.

Note: Mutual funds are valued based on closing price (net asset value) on the date the donor loses control over the donated shares, multiplied by the number of donated shares.

For questions about stock transfers or mutual funds, please contact the Office of Philanthropy at **410-772-6930** or via email at **philanthropy@medstar.net**.

Give by wire transfer

To make your gift via wire transfer, contact your banking institution and provide the following information:

Wire Instructions (for U.S. Dollar)

Northern Trust Company

Chicago, IL 60675

ABA # 071000152

Account Name: Master Trust Incoming Wire Account Credit Account # 5186061000

Key information to include:

- For Further Credit (FFC) Account Name: MedStar Health
- Gift FFC account number: 44-82990
- Reference: donor name, MedStar Health institution, and the gift designation.

For questions about cash wire transfers or international wire instructions, please contact the Office of Philanthropy at **410-772-6930** or via email at **philanthropy@medstar.net**.

Planned giving

Unlike cash donations, planned gifts, also referred to as “deferred gifts,” are typically made from assets in your estate, rather than disposable income. There are several ways to make a planned gift:

Giving a **bequest** through your **will or trust** offers a way to support MedStar Health without impacting your discretionary spending.

Life income gifts allow you to make a gift and receive income back for life or a term of years for you or a member of your family.

Beneficiary designations of your retirement account or insurance policy are easy to implement and can be completed through a change of beneficiary form.

Other creative gift plans provide opportunities to transfer ownership of real estate, personal property, or another asset to allocate a planned gift to MedStar Health.

IRA Charitable Rollover gifts

If you are 70 ½ or older, you can direct up to \$100,000 each calendar year to a qualified charity directly from your IRA.

Note: Under the SECURE Act, which took effect in January 2020, the new age at which required minimum distributions (RMDs) must start is age 72. Despite the delay in the starting age for RMDs, though, Qualified Charitable Distributions (QCDs) from IRAs will not be affected by the SECURE Act; accordingly, QCDs may still be taken from IRAs as early as age 70 ½.

To make a Charitable IRA Rollover: Contact your IRA administrator and request a distribution to be made to MedStar Health directly from your IRA. Request that your administrator include your name with the distribution. Check with your administrator for any deadlines that may have an impact on your gift. Request that checks be sent to:

MedStar Health
Office of Philanthropy, 7th Floor
10980 Grantchester Way
Columbia, MD 21044

MedStar Health Tax ID: 52-2087445

For more information on planned giving, or to notify us of an incoming gift or planned gift intention, please contact the Office of Philanthropy at **410-772-6930** or via email at **philanthropy@medstar.net**.

This document is not intended as, and should not be considered as, legal, tax, financial, or other advice. MedStar Health strongly encourages you to seek independent professional advice to find the right philanthropy strategy to align with your goals and circumstances.