



## Ways to make a charitable 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](mailto:philanthropy@medstar.net) or call **410-772-6747**.

### **Give online**

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

### **Give by phone**

Call us at **410-772-6747**.

### **Give by mail, UPS, or FedEx**

Your generous contribution can be payable to MedStar Health and mailed 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 UPS, FedEx or another courier must be received by Dec. 31.*

### **Give stock or mutual funds**

When making your gift of stock, please tell your brokerage firm 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: Per IRS guidelines, stocks or bonds are valued on the average of the high and low selling prices on the date of transfer, 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

### **Mutual funds**

MedStar Health uses Northern Trust Corporation to handle contributions from 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 and provide you as donor with the account number so that you can complete the transfer. To facilitate this donation, please contact the Office of Philanthropy at **410-772-6747** or via email at [philanthropy@medstar.net](mailto:philanthropy@medstar.net).

*Note: Mutual funds are valued based on closing price (net asset value) on the date the donated shares are transferred from the donor's control, multiplied by the number of donated shares.*

### **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

### **How to recommend a gift through a donor-advised fund**

1. Request a grant distribution through your DAF sponsor.
2. Include the **tax ID** of your designation.
3. Indicate whether your gift is designated to a specific program or area of greatest need.

## 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 age at which required minimum distributions (RMDs) must start increased to age 72. Despite the delay in the starting age for RMDs, Qualified Charitable Distributions (QCDs) from IRAs were not affected. For that reason, QCDs may still be taken from IRAs as early as age 70 ½.*

**To make an IRA Charitable 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  
10980 Grantchester Way, 7th Floor  
Columbia, MD 21044

1. Include the **tax ID** of your designation.
2. Indicate whether your gift is designated to a specific program or area of greatest need.

Please contact the Office of Philanthropy at **410-772-6747** or via email at [philanthropy@medstar.net](mailto:philanthropy@medstar.net) to inform us of the purpose and intended entity of your IRA rollover gift.

## Gift planning

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.

*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.*