

LUMINIS HEALTH ANNE ARUNDEL MEDICAL CENTER FOUNDATION, INC.

Gifts of Stock

Luminis Health Anne Arundel Medical Center (LHAAMC) 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 LHAAMC Foundation. For more information, please call the Foundation Office at 443-481-4730 or email foundation@luminishealth.org. You can also consult your accountant or financial advisor.

Transferring Stocks Electronically

- ❖ You may transfer stocks electronically through your bank, brokerage firm, trust company, or CAM Wealth Management.
- ❖ Before you transfer stock, please notify the Foundation of your intent to do so by calling the Foundation at 443-481-4730 or by emailing foundation@luminishealth.org. Please provide the following information:
 - Your Name
 - Designation of your gift
 - Name and phone number of your broker
 - Name of stock being transferred
- ❖ Please instruct your broker to transfer the stock to:
 - CAM Wealth Management
Kevin B. Collison, CFP®, Scott G. McRoy, CFP®
200 Westgate Circle, Suite 400
Annapolis, MD 21401
www.CAMWealthManagement.com
Ameriprise Financial DTC: 0756
Account Number: 6950-7370 for credit to Luminis Health 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 you at your home or office to receive the certificates.
- ❖ When you deliver, or we pick up, certificate(s), we will ask you (and any other donor(s) involved) to:
 - Endorse the certificate(s) in our presence; and
 - Sign a form, which we will notarize, releasing the certificate(s) to LHAAMC Foundation

Delivering Stocks by Mail

- ❖ LHAAMC 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 LHAAMC 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 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 LHAAMC Foundation, 2000 Medical Parkway, Belcher Pavilion, Suite 604, Annapolis, MD, 21401.
- ❖ Please enclose a cover letter providing your name, address, telephone number along with any designated purpose for which the gift is being made.

Kevin B. Collison, CFP®, and Scott G. McRoy, CFP® of CAM Wealth Management, Ameriprise Financial Services, Inc. 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.



C | A | M
WEALTH MANAGEMENT

Please call Maria Vallecillo at 410-649-5076 with any questions for CAM Wealth Management.

Powered by Ameriprise
Financial

Letter of Instruction

To (your broker): _____

I/We wish to make a gift of stock to the **Luminis Health Anne Arundel Medical Center Foundation**. You are hereby directed to transfer:

_____ or \$ _____
Number of Shares *Dollar Amount*

Of _____
Name of Stock/Security

From my/our account # _____
Account Number

Transfer securities electronically to: Ameriprise Financial
DTC: **0756**
Luminis Health Anne Arundel Medical Center Foundation
Account #: **6950-7370**

Please include my/our name(s) on the transfer so that the gift can be identified by the Foundation.

Signature _____ Date _____

Signature _____ Date _____

IRREVOCABLE STOCK OR BOND POWER

FOR VALUE RECEIVED, the undersigned does (do) hereby sell, assign, and transfer to

(Social Security or Taxpayer ID Number)

**IF STOCK,
COMPLETE THIS
PORTION**

_____ Shares of the _____ stock of _____
Represented by Certificate(s) No(s). _____
Inclusive, standing in the name of the undersigned on the books of
said Company.

**IF BONDS,
COMPLETE THIS
PORTION**

_____ Bonds of _____
In the principal amount of \$ _____, No(s). _____
Inclusive, standing in the name of the undersigned on the books of
said Company.

The undersigned does (do) hereby irrevocably constitute and appoint _____

Attorney to transfer the said stock or bond(s), as the case may be, on the books of said company, with full power of substitution in the premises.

IMPORTANT: The signature(s) to this power must correspond with the name(s) as written upon the face of the certificate(s) or bond(s) in every particular without alteration.

(Person(s) executing this power sign here)

Dated _____