

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 Wealth Management
- Before you transfer stock, please notify the Foundation of your intent to do so by calling our office at 443-481-4747. 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®, Christopher J. Asher, CFP®, Scott G. McRoy, CFP®
200 Westgate Circle Suite 400
Annapolis, MD 21401
410-649-5071
www.CAMWealthManagement.com
Ameriprise Financial via DTC: **0756**
Account #6950-7370 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 you at your home or office to receive the certificates. Please note that due to COVID-19 restrictions, our team has made adjustments to our interactions with donors at this time. Please consult a member of the Foundation team before stopping by our office to ensure we receive your donation in a safe, and timely, manner.
- 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 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 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®, and Scott G. McRoy, CFP® of CAM Wealth Management, Ameriprise Financial Services, Inc. are

C | A | M
Wealth Management

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.

200 Westgate Circle
Suite400
Annapolis, MD 21401

410-649-5071

LETTER OF INSTRUCTION

To (your broker): _____

I/We wish to make a gift of stock to the **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**

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(s) here)

Dated _____