



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

### Give by wire transfer

Please provide the following information to your banking institution:

#### 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: (please provide your name)

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### Give via a gift of stock or securities

To gift stock, please tell your brokerage firm to provide the following information with gift 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

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### 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 **410-772-6735** 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.*

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### Send a check by mail, UPS, or FedEx

Your check should be made payable to **MedStar Health** and mailed to:

Bruce A. Bartoo, CFRE  
Senior Vice President & Chief Philanthropy Officer  
MedStar Health  
10980 Grantchester Way, 7th Floor  
Columbia, MD 21044

*Note: For calendar year tax credit, checks must be postmarked by December 31.*



## Ways to make a philanthropic gift to MedStar Health.

### Give via credit card

Visit [MedStarHealth.org/Philanthropy](https://www.MedStarHealth.org/Philanthropy) to give online or call the Office of Philanthropy Gift Processing Center at **410-772-6735**

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### How to recommend a gift through a Donor-Advised Fund

1. Request a grant distribution through your DAF sponsor.
2. Include the [Federal Employer Identification Number \(EIN\)](#) of your designation.
3. Indicate whether your gift is designated to a specific program or area of greatest need.

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### IRA Charitable Rollover gifts

If you are over age 70½, you can direct up to \$100,000 from your IRA each calendar year to a qualified charity.

*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 and may therefore still be taken from IRAs as early as age 70½.*

**To make an IRA Charitable Rollover:** Contact your IRA administrator and request a distribution be made to MedStar Health directly from your IRA. Please ask your administrator to include your name with the distribution and determine any deadlines that may have an impact on your gift. Checks should be sent to the address as noted at the bottom of this page. Please also note the following:

1. The MedStar Health Federal Employer Identification Number (EIN) is **52-2087445**. If you wish to direct your payment to another MedStar Health entity, please click [here](#) to find and note the correct EIN.
2. Indicate whether your gift is designated to a specific program or area of greatest need.

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### 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, including making a bequest through your **will or trust**, which 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.

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### For any questions about ways to give, please contact:

Bruce A. Bartoo, CFRE  
Senior Vice President & Chief Philanthropy Officer  
MedStar Health  
10980 Grantchester Way, 8th Floor  
Columbia, MD 21044  
Phone: **410-772-6735**  
Email: [bruce.bartoo@medstar.net](mailto:bruce.bartoo@medstar.net)

**IMPORTANT NOTE:** This document is not intended as legal, tax, or financial advice. MedStar Health strongly encourages you to seek independent professional advice to identify the most appropriate philanthropy strategy to align with your charitable giving goals and circumstances. Additional information can be found at [MedStarHealth.org/Philanthropy](https://www.MedStarHealth.org/Philanthropy).