

GARRETT REGIONAL MEDICAL CENTER

A PROUD AFFILIATE OF



With a planned gift to Garrett Regional Medical Center, you can combine your desire to give to charity with your overall financial, tax, and estate planning goals. Planned giving gives you a special connection with your community. You will help those touched by Garrett Regional Medical Center—for now and for years to come.

A gift of appreciated securities held for more than one year may provide significant benefits to you as a contributor, such as:

- Entitling you to a charitable income tax deduction for the fair market value of the gifted securities as of the date of gift.
- Eliminating capital gains tax that would ordinarily become due if you had sold the appreciated securities on the open market and donated the proceeds from the sale to charity.
- Claiming your charitable deduction against up to 30% of your adjusted gross income. Any unused deductions can be carried forward over the next five years.
- Providing a way to help you to achieve your long-term financial objective of reducing your income and estate taxes.

If you have securities that have declined in value over the years and are interested in donating them to charity, you may find it more advantageous to sell the securities first and contribute the proceeds to charity as opposed to donating the securities outright. This strategy should allow you to claim a deduction for both the loss from the sale of the securities as well as the charitable gift.

If you are considering donating stock that is subject to a cash merger or tender offer, it's important for you to note that you will be subject to tax on the capital gain even though the shares were transferred to us before the tender offer became effective.

You should always consult with your financial and tax advisor before initiating a charitable gift arrangement.

Gifts of appreciated securities could provide even greater benefits to you through Planned Giving.

Ways to Give Securities

There are two ways to make a donation of securities: by Physical Delivery or through an Electronic Transfer Authorization. Be sure to notify us of your decision.

1. Physical Delivery:

If you have physical securities, you may deliver them in person, by registered mail, or by courier to 251 North Fourth Street Oakland, Maryland 21550. If they are registered in your name, you will need to provide an Irrevocable Stock/ Bond Power Form.

2. Electronic Transfer Authorization:

Your broker can electronically transfer your securities to GRMC. Because this request must be made in writing we provide an Electronic Transfer Authorization form.

Instructions for the Gift of Paper Securities

Attached is my irrevocable transfer for the attached securities to Garrett Regional Medical Center.

I hereby assign and transfer to Garrett Regional Medical Center:

Shares of Stock

_____ shares of the common/preferred stock of _____

represented by Certificate No. (s) _____ inclusive, standing in the name of the undersigned on the books of said Corporation.

Bonds

_____ bonds of _____ in the principal amount of

\$ _____, Certificate No. (s) _____ standing in the name of the undersigned on the books of said Corporation.

The undersigned does (do) hereby irrevocably constitute and appoint First United Bank & Trust to transfer the said stock, or debenture, as the case may be, on the books of said Corporation with full power of substitution in the premises.

Signed (Donor) _____ Date _____

Signed (Donor, joint-owner) _____ Date _____

Information to provide to Garrett Regional Medical Center:

Donor's Name: _____

Address: _____

City: _____ State _____ Zip _____

My Gift is:

In Memorial/Honor of _____

In Support of my local _____ or is a General Donation as directed below.

I hereby release my name and contact information so that I may receive a receipt from Garrett Regional Medical Center. Note: If you choose not to release your name and contact information, GRMC will not be able to provide you with a receipt of your gift.

Please send any questions to sbortz@gcmh.com

Please forward securities and this form to Steve Bortz, Vice President GRMC Foundation,
251 North Fourth Street, Oakland, Maryland, 21550.

Instructions for the Electronic Transfer of Securities

Garrett Regional Medical Center cannot initiate transfers from your financial advisor

Financial Advisor Instructions

Bank of New York c/o First United Bank & Trust

DTC Participant #901

Internal Account #120180

For Further Credit to: Garrett Regional Medical Center

Tax ID # 52-6406844

Account # 003043

Financial Advisor Contact: First United 301-533-2216

Securities Information

Name of Security Number of Shares/ Bond Face Value

Information to provide to Garrett Regional Medical Center:

Brokerage's Name: _____

Brokerage: _____

Donor's Name: _____

Address: _____

City: _____ State _____ Zip _____

My Gift is:

In Memorial/Honor of _____

The information on this page is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

