

## Instructions for Gifting Stock, Bonds or Shares of Mutual Funds To



**SUBURBAN HOSPITAL**  
JOHNS HOPKINS MEDICINE

### For securities held by bank or brokerage house:

1. Call your broker and provide the following information to facilitate an electronic transfer of stock:

Deutsche Banc Alex. Brown  
Broker: Laura-Lynn Renner (Assistant: Ed Bergen )  
100 International Drive, 22<sup>nd</sup> Floor  
Baltimore, MD 21202  
Phone: 410-525-6240  
Fax: 410-895-3950  
[Laura-Lynn.Renner@alex-brown.com](mailto:Laura-Lynn.Renner@alex-brown.com)

DTC# 0725 Raymond James Clearing  
Account Number: 218HR183  
Account Name: Suburban Hospital Foundation Inc.

2. Send a follow up letter to your broker (with a copy to the Suburban Hospital Foundation Office) which confirms your telephone conversation. A sample letter is below.
3. Contact Terri Kerner in the Foundation Office, 301-896-3971 to let us know what type of stock you plan to transfer, the number of shares, your brokerage house, broker's name and contact information.

### Securities Delivered by Mail:

You can forward your stock certificate(s) directly to Suburban Hospital. Mail to us your unendorsed certificate(s) via registered mail. Send the stock power form in a separate envelope to:

Suburban Hospital Foundation  
8600 Old Georgetown Road  
Bethesda, MD 20814

We recommend that you send the certificate(s) via registered mail. If you have questions about making a stock donation to Suburban Hospital, please 301-896-3971.

### Important Don'ts:

Do not sell your securities and forward the proceeds to Suburban Hospital. This will then be considered a cash donation and you may be required to pay capital gains tax on the gift.

If your securities have depreciated in value (generated a loss since their purchase) you may wish to sell and donate the proceeds. Contact your tax advisor regarding the advisability of your approach.

As a general rule, it is not wise to donate stock that you have held for less than one year.

Date:

Broker Name  
Address  
City/State/Zip

Dear \_\_\_\_\_:

This letter authorizes you to transfer (#)\_\_\_\_\_ shares of (name of stock) \_\_\_\_\_  
from my account (#)\_\_\_\_\_ to Suburban Hospital to benefit (“the area of greatest need”  
or a specific program or area of care) \_\_\_\_\_.

Transfer information is as follows:

DTC Delivery Instructions:

Deutsche Bank Alex. Brown  
100 International Drive, 22nd Floor  
Baltimore, MD 21202  
Attn: Laura-Lynn Renner  
Direct: 410-525-6240  
Toll Free: 800-638-2596  
Email: laura-lynn.renner@alex-brown.com

DTC# 0725 Raymond James Clearing  
Account Number: 218HR183  
Account Name: Suburban Hospital Foundation Inc

Thank you for your attention to this transfer.

Sincerely,

\_\_\_\_\_  
(Your name and signature)

cc: Terri Kerner  
Suburban Hospital Foundation  
8600 Old Georgetown Road  
Bethesda, MD 20814