

GIFTS OF STOCK OR OTHER SECURITIES

Thank you for your interest in supporting EVMS with a gift of stock or other securities. Stock gains can be put to good use by reinvesting in the community. Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides a greater tax benefits to donor than giving cash. Not only can the donor deduct the full market value of securities but also avoid paying capital gains tax on the appreciation.

Instructions for Gifts of Securities:

- Please notify EVMS Development of your intended gift by completing the EVMS Foundation Stock Gift Form (below). ***This ensures that your gift is properly identified, designated and processed accurately and on a timely basis.***
 - Phone: 757.965.8500
 - Email: Giving@evms.edu

The following information is requested:

- Donor's Name and Contact Information
- Broker's Name, Firm & Contact Info
- Stock Name/Symbol
- Number of Shares/Approximate Value

EVMS Foundation's Broker Contact Information:

Morgan Stanley

- *Primary Contact:* Chuck Jarrett: 757-597-9627
 - *Team Support:* 757-493-2124
- *Account Number:* 529-026390-040
- *Delivery Trust Company (DTC):* No. 015
- *EVMS Foundation Tax Identification Number:* 23-7053028

Charles Schwab

- *Kristen Zigrang:* 757-623-3676
- *Alondra Garcia:* 757-623-3676 x.379
- *Account Number:* 6675-6129
- *Delivery Trust Company (DTC):* No. 0164 / Code: 40
- *EVMS Foundation Tax Identification Number:* 23-7053028

Other Information:

- EVMS Foundation will sell securities upon receipt.
- For internal EVMS recognition purposes, the gift value is determined to be the average of the high and low quoted selling price during the day of receipt.
- Please consult with your tax advisor for complete tax deductibility information.

**EASTERN VIRGINIA MEDICAL SCHOOL FOUNDATION
STOCK GIFT FORM**

Donor Information:

- Donor's Name: _____
- Donor's Phone: _____
- Donor's Address: _____
- Donor's City, State, Zip: _____

Gift Information:

- Stock Name and Symbol: _____
- Number of Shares or Approximate Value: _____
- Expected date of transfer: _____
- Gift Designation: _____

Broker Information:

- Broker/Advisor Name: _____
- Brokerage Firm: _____
- Broker Phone Number and Email: _____

EVMS Foundation Information:

- Account Name: Eastern Virginia Medical School Foundation
- Account Number: 529-026390-040
- DTC: No. 015

Please Note Any Specific Instructions: _____

Note to Donors:

Thank you very much for your generosity. This form was designed to facilitate the timely acknowledgement of charitable gifts of stock and other securities. These types of contributions normally involve transferring securities directly from your brokerage account to an EVMS Foundation brokerage account. In order to properly acknowledge your gift and provide the receipt you will need for the IRS, we will need to know your name and address, and which shares you transferred. Your broker's confidentiality rules may require your expressed permission to release this information. If you are planning to make a stock gift, please complete this form and send it to the EVMS Foundation by mail (EVMS Foundation, P.O. Box 5, Norfolk, VA 23501) or email (giving@evms.edu). Alternatively, you or your broker may call us at 757-965-8500 and provide the information by telephone.

Note to Brokers:

The EVMS Foundation's Treasurer's Office is the authorized office to make stock trades and to establish new accounts on behalf of the EVMS Foundation. If you would like to discuss the sale of specific shares of a security or the creation of a new brokerage account, please contact Ms. Tammy Chrisman, Assistant Treasurer of the EVMS Foundation, at (757) 446-6065, or Chrismta@evms.edu.

The Eastern Virginia Medical School Foundation is a charitable corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. The Internal Revenue Service has determined that the EVMS Foundation is a public charity and not a private foundation within the meaning of Section 509(a) of the Internal Revenue Code. Donors may deduct contributions to the Foundation as provided by Section 170 of the Internal Revenue Code, and bequests or gifts to the Foundation are deductible for Federal Estate and Gift Tax purposes under Sections 2055 and 2522 of the Code. For specific application of charitable tax laws, you are encouraged to consult your attorney or financial advisor.