Appreciated assets, such as stocks or mutual funds that have been held longer than one year and have appreciated in value, may be donated to the MedGlobal Response, Inc. (MEDGLOBAL) and may provide you with tax savings. Of course, you may also contribute cash to our organization’s brokerage account.

When you give appreciated assets, you avoid paying capital-gains tax on the increased value of your stock. You may also be entitled to a charitable deduction based on the stock’s current value. Contributing stock is a great way to support MEDGLOBAL and its mission.

When considering gifts of stock, we recommend you consult with your financial adviser.

How to donate stock to MEDGLOBAL

When providing instructions to your broker, please be sure to have the stock transfer form clearly designate the donation to MEDGLOBAL. Our legal name is MedGlobal Response, Inc.. Your broker will need the following information:

- DTC# 0728
- Account # RH8650800D, for the benefit of MedGlobal Response, Inc.
- Folio Institutional 8180 Greensboro Drive 8th Floor McLean, VA 22102
- Foliofn Contact: 1-888-485-3456

VERY IMPORTANT: **You must complete our donation form before submitting your donation to confirm that our broker will accept your donation.** Mutual funds require special handling. We must confirm with our investment manager that they will be accepted.

It is important to notify MEDGLOBAL when you have completed your request to your broker. Please alert MEDGLOBAL directly of your pending stock donation (including the financial company and number of shares) so that we can credit your gift in a timely and accurate manner. To ensure proper gift identification, please contact MEDGLOBAL Donor Department at https://www.medglobal.org/contact/
Contribute to MedGlobal Response

Contributions to MEDGLOBAL’s brokerage account can include appreciated stocks, and mutual funds. Note: Mutual fund donations require special handling; please do not submit unless you have confirmed with MEDGLOBAL that they will be accepted. Before making your donation, please call MedGlobal’s Donor Dept.

Note: donating shares held less than a year may impact your deduction. Please consult with your tax advisor.

Section 1. Your (Donor) Information

Please complete the below to ensure that MEDGLOBAL provides you with a donation receipt:

Your Name: ___________________________ Social Security Number: ___________________________

Full Mailing Address: ___________________________________________________________________

Telephone Number: ____________________ Email Address: ___________________________________________________________________________

Section 2. To transfer stocks or mutual funds held at other Financial Institutions

NOTE: Securities must be marketable and in most cases penny stocks are NOT accepted.

☐ I will initiate the transfer of assets by:
  • Contacting my financial institution directly to request the required procedures and forms and providing them the delivery instructions in Section 5 below.
  • Using a separate form for each transfer from separate financial institutions.
  • Faxing a copy of this signed form to Foliofn Investments 703-649-6288.

Name of Financial Firm Holding Assets: ___________________________ Telephone Number: ___________________________

Name on Account(s): ___________________________ Account Number: ___________________________

Financial Firm Address: ___________________________________________________________________________

Below specify assets to be transferred to this Brokerage Account. We hereby authorize Foliofn Investments to accept the below security transfers into the account identified in Section 4.

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<th>Name of Security</th>
<th>Symbol</th>
<th>Number of Shares (or All)*</th>
<th>Approximate $ Value</th>
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*Number of shares must be specified, not approximate value because a security’s value may fluctuate.
Section 4. Authorize Contribution
This is my written authorization to irrevocably transfer ownership of the assets listed on this form to the MedGlobal Response brokerage account RH8650800D. I understand that any contribution once accepted by the account, represents an irrevocable gift and is not refundable to me for any reason. Foliofn Investments may rely on a facsimile copy of my signature as a binding and enforceable signature, admissible in any proceeding to the same extent as if this form were submitted in manual form.

Authorized Signature: ___________________________ Date: ___________________________

Section 5. Delivery Instructions
All deliveries must include the Account Holder’s name and your Account Number at your Financial Institution. The financial institution will need these delivery instructions to make the contribution.

DTC#0728 Control#040
ATTN: ACATS
Folio Institutional
PO Box 10246
McLean, VA 22102
Account #RH8650800D, for the benefit of MedGlobal Response, Inc
Tel: 888-485-3456 Fax: 703-649-6288 Email: Support@FolioInstitutional.com