

INSTRUCTIONS FOR TRANSFERRING APPRECIATED STOCK

One of the most satisfactory ways to make a gift to MDIBL is to use appreciated stock. Giving stocks, bonds and mutual funds that have increased in value (and been in your portfolio for more than one year) provides greater tax benefits to you than giving cash. Not only can you deduct the full market value of the securities, but you also avoid paying capital gains tax on the appreciation.

Step 1: Please fill out the attached form and fax/email to Jeri Bowers, Director of Development, at 207-288-2130 or via email at development@mdibl.org.

Please note: Due to the limitations of the wire transfer process, your name is not always included in the transfer information received by our broker. It is critical that you notify the Development Office of the stock name and estimated number of shares ensures our ability to accurately identify and credit your gift.

Step 2: Notify your broker of your desire to transfer stock to the MDI Biological Laboratory. The broker will request the following account information:

All trade confirmations should be delivered as follows:	
Full ACATS Eligible:	ACATS Participant #0226 Fidelity Investments
DTC Participant #	0226 (Fidelity Investments)
Account #	676-186507
Account Name:	Midwest Trust Company
FFC:	MDI Biological Laboratory #40392000270

**All deliveries must include this statement in addition to delivery instructions:
“FBO MDI Biological Laboratory account #40392000270”**

DTC Eligible Securities	Deliver to: DTC Participant #0226 (Fidelity Investments) Acct: #676-186507 Acct Name: Midwest Trust Company Further Credit To: MDI Biological Lab, account #40392000270
FED Book-Entry and GNMA Securities	Book to: J.P.M. Chase / NFSC, ABA #021000021 Acct Number: 676-186507 Acct Name: Midwest Trust Company Further Credit To: MDI Biological Lab, account #40392000270
Mutual Fund Instructions	Fidelity/NFS Account Name: Midwest Trust Company Note: Mutual fund transfers will be initiated via ACAT on our behalf by Fidelity as our agent. If ACATS request has not been received from Fidelity/NFS, please contact middleoffice@trustops.com

SECURITIES TRANSFER INSTRUCTIONS

Fax or email this completed form to Jeri Bowers at 207-288-2130 or
development@mdibl.org

Donor Information:
Name:
Address:
Email:
Telephone:

Securities Information:
Stock Name/Ticker Symbol:
Number of Shares Transferred:
Date of Transfer:
Broker Name:
Broker Telephone Number:
Broker Email:

MDI Biological Laboratory Broker Information:
DTC Number: 0226 (Fidelity Investments)
Account Number: 676-185507
Account Name: Midwest Trust Company
FFC: MDI Biological Laboratory acct# 40392000270
All deliveries must include this statement in addition to delivery instructions: "FBO MDI Biological Laboratory account #40392000270"