



# Ways to Give



**Everyday life is possible because of you and your support of Marklund.**

Please reference the following information to assist you when selecting the most appropriate option to make your gift to Marklund. Thank you for your commitment to the people we serve.

Marklund Tax ID: **36-4074849**

## **GIFTS of Cash**

### Online

Visit [Marklund.org](http://Marklund.org) and click the “Donate” button to make a one-time or monthly gift using the secure online form.

### Mail

Send your check (made payable to Marklund) to:  
1S450 Wyatt Dr, Geneva IL 60134

### Corporate Match

Many employers sponsor programs matching charitable contributions made by their employees. Gifts made by employee’s spouses and retirees may also be eligible. To see if your employer participates, please visit [www.marklund.org/corporate-matching-program/](http://www.marklund.org/corporate-matching-program/)

### ACH or Wire Transfer

Please contact us to request these instructions.

### Donor Advised Fund

When making a grant recommendation, provide the following information:

Marklund  
1S450 Wyatt Dr,  
Geneva IL 60134  
Federal Tax ID: 36-4074849

## **GIFTS of Stock or Mutual Fund**

Refer to the “Gifts of Stock or Mutual Fund Transfer” sheet below. People who are age 70½ or older can contribute up to \$100,000 from their IRA directly to a charity and avoid paying income taxes on the distribution. This is known as a Qualified Charitable Distribution.

## **GIFTS Through Your Will or Estate**

- Add a charitable bequest intention to include Marklund in your will.
- Work closely with your IRA custodian to request a direct distribution to Marklund through a Qualified Charitable Distributions from an IRA (IRA charitable rollover gift).
- Life income gifts, charitable lead trusts, retirement plan assets, and gifts of real estate can also be made. Please contact us for further information and guidelines.

## **ONLINE GIFT Scan Here**



**Once you’ve made your gift, please take a moment to notify us so we can express our gratitude to you!**

**Still have questions?** Contact Natalie Sarby, Individual Giving Manager, at 630.593.5461 or [nsarby@marklund.org](mailto:nsarby@marklund.org).

This information is intended to assist you in your tax, estate, and charitable planning. It is not intended as legal or tax advice. For such advice, please consult an attorney or financial advisor.

## Ways to Give



### GIFTS of Stock or Mutual Fund

01 Please complete this form and forward it to your financial advisor.

02 Please also send a copy of this form to:  
**Natalie Sarby,**  
*Individual Giving Manager,*  
nsarby@marklund.org

#### DTC Transfer Instructions for Financial Advisor

For gifts of stock shares to Marklund, please deliver DTC-eligible securities to Fidelity:

#### **DELIVER TO:**

DTC Clearing 0226

**FBO: 657744480 Marklund**

#### MUTUAL FUNDS

Have advisor or delivering firm fax request to:

Fidelity Mutual Fund Receives department at (800)753-2050.

Reference Marklund Account Number: **657-744480**

#### IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor name & address
- Name of stock or mutual fund and number of shares
- Estimated value

TO (DONOR'S FINANCIAL ADVISOR)

TELEPHONE

EMAIL

FAX

Please use this form as authorization to transfer the securities listed below from my account as my gift to Marklund.

FROM (DONOR NAME)

ADDRESS

CITY / STATE / ZIP

TELEPHONE

EMAIL

NAME OF STOCK

NUMBER OF SHARES

GIFT PURPOSE

SIGNATURE