

Securities Donation Instructions

One tax-advantaged way for a donor to give a gift to the American Academy of Family Physicians Foundation is to donate appreciated securities.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides donors with greater tax benefits than giving cash. Not only can the donor deduct the full market value of the securities but also avoid paying capital gains tax on the appreciation. Donors are encouraged to consult their attorney or accountant to better understand the benefits of this type of gift.

Step 1: Transfer shares held at a securities firm or other brokerage account

- Provide the following instructions to your financial advisor or the institution where securities are held to transfer the shares to:

Charles Schwab
DTC # 0164
Code# 40
Account # 5303-8645

- Instruct your broker to enter identifying information (i.e. your name and address, phone number, account number, broker information) into the "Text Comment" field of the DTC screen.
- If you would like to transfer shares of mutual funds, please contact Diane Spaite at 913.815.6541 or diane.spaite@creativeplanning.com to make certain that the shares can be accepted.

If certificates/shares are in your physical possession, please contact Diane Spaite at 913.815.6541 or diane.spaite@creativeplanning.com for additional instructions.

Step 2: Notify AAFP Foundation

Securities donations often transfer with no accompanying donor information. For the AAFP Foundation to identify your gift, utilize it according to your desires, and send a tax receipt, please provide the gift details requested below:

- Donor Name
- Donor Address
- Donor Phone
- Donor E-mail
- Name and Type of Security
- Number of Shares
- Approximate Transfer Date
- Name of Brokerage Firm
- AAFP Foundation program or area this gift should support – While the Annual Fund is the most popular option, gifts can also be directed to specific programs or endowments. Please note if you would like to speak with a staff member to learn more.

Fax or e-mail this information to the AAFP Foundation at 913-906-6095 or foundation@aafp.org. You can also call the office at 800-274-2237.

Thank you! We appreciate your partnership and investment to help improve health.