

## Securities Donation Instructions

Thank you for considering a gift of appreciated securities to the AAFP Foundation.

Giving stocks, bonds, and mutual fund shares that have increased in value (and which the donor has owned for more than one year) provides greater tax benefits than giving cash, while still supporting the mission of the AAFP Foundation. Please consult your tax attorney or accountant to understand exactly how this type of gift can make a difference for you. Typically, the donor should be able to deduct the full market value of the securities and avoid paying capital gains tax on the appreciation.

Please follow the instructions below to gift appreciated securities.

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

- Ask 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 have physical certificates/shares or would like to transfer shares of mutual funds, please contact Jeff Aleshire at (913) 742-7230 or [jeff.aleshire@creativeplanning.com](mailto:jeff.aleshire@creativeplanning.com).

### Step 2: Notify the AAFP Foundation

Securities donations often transfer with no accompanying donor information. For the Foundation to identify your gift, utilize it according to your desires, and send a tax receipt, please contact the AAFP Foundation with the information 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
- Area you would like this gift to support – Popular options include a named endowment, specific program, or the Annual Fund, which supports the areas of greatest need. Please make a note if you would like more information and a staff member will contact you soon.

Fax or e-mail this information to the AAFP Foundation at 913-906-6095 or [foundation@aafp.org](mailto: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.