



Securities Donation Instructions

One tax-advantaged way for a donor to give a gift to the American Academy of Family Physicians Foundation (AAFPF) 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—may provide donors with greater tax benefits than giving cash. Not only can the donor deduct the full market value of the securities, but they may also avoid paying capital gains tax on the appreciation.

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, including your name and address, phone number, account number, and broker information, into the "Text Comment" field of the DTC screen.

If you would like to transfer shares of mutual funds, please contact Tiya Lim at (913) 800-1152 or tiya.lim@creativeplanning.com to make certain that the shares can be accepted.

If certificates or shares are in your physical possession, please contact Tiya Lim at (913) 800-1152 or tiya.lim@creativeplanning.com for additional instructions.

Step 2: Notify AAFP Foundation

Securities donations often transfer with no accompanying donor information. In order for the Foundation to identify your gift 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

Please notify Mike Armstrong, AAFP Foundation, at (913) 906-6128 or marmstrong@aafp.org