

# Gifts of stock Or mutual Funds



## Contributing appreciated securities to the ASFIP Foundation

Gifts of long-term appreciated stock or mutual fund shares are an easy way to make a lasting contribution to the ASFIP Foundation. Benefits include:

- Income tax savings – For securities you have owned for more than one year, you can take an immediate income tax deduction.
- Capital gain tax savings – Avoid capital gains taxes you would have incurred if you had sold the stock or mutual fund shares.
- Improve financial literacy – Provide crucial support to ASFIP Foundation as it addresses the need for financial literacy in the community where ASFIP members work.

## How to make a gift of long-term stock of mutual fund shares

### • Notify the ASFIP Foundation

We ask that you or your broker notify the Foundation prior to transferring shares. This will help ensure that your gift is handled properly and acknowledged for tax purposes. Contact information is provided on page two. Email is preferred – [Foundation@ASFIP.org](mailto:Foundation@ASFIP.org)

Please include the following in your notification to the ASFIP Foundation:

- Your name
- Number of shares
- Name of stock or mutual fund

### • Transfer the shares

The easiest way to give a gift of stock is through your broker. The ASFIP Foundation has a brokerage account with Charles Schwab. Notify your broker that you would like to make a charitable gift of stock to ASFIP Foundation, providing your broker with the Charles Schwab account information listed on page two. We have included a sample stock instruction letter for your broker also on page two. If your own account is with Charles Schwab, your broker may make an in-house transfer to the ASFIP Foundation's account.

# Stock Transfer Instruction Letter

Date:

Stockbroker:

Brokerage Firm:

Address

**Regarding: Transfer to the ASFIP Foundation**

Name of Stock Owner Account:

Registration:

Account #:

Dear Broker/Representative/To Whom It May Concern:

Please accept this letter as authorization to transfer from the shareholdings recorded under account number \_\_\_\_\_ to ASFIP Foundation, via our Brokerage account, a gift of \_\_\_\_\_ shares of \_\_\_\_\_ stock

[ ticker symbol \_\_\_\_\_ ].

Please do not sell or redeem these units, as doing so may result in negative tax consequences. Before transferring, please contact ASFIP Foundation via email ([Foundation@asfip.org](mailto:Foundation@asfip.org)).

Sincerely,

**ASFIP Foundation  
Contact Information**

Stephen Davenport, President  
ASFIP Foundation

4355 Cobb Parkway  
Suite J-533  
Atlanta, GA 30339

T: 678-324-8474  
E: [Foundation@ASFIP.org](mailto:Foundation@ASFIP.org)

**Charles Schwab  
Account Information**

Charles Schwab & Co. Inc  
DTC # 0164

1201 Peachtree St, NE,  
Suite #400A  
Atlanta, GA 30361

T: 1-800-515-2157  
Account Name: ASFIP Foundation  
Account # 9774-2058

ASFIP Foundation Federal Tax ID # 47-5514105