



TSF



The Thoracic Surgery Foundation

The Thoracic Surgery Foundation • 633 N. Saint Clair Street, Suite 2100, Chicago, IL 60601 • Ph: 312-202-5868 • tsf@sts.org

Gifts of Stock

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift to TSF.

Benefits of Gifts of Stocks and Bonds

- Avoid paying capital gains tax on the sale of appreciated stock
- Receive a charitable income tax deduction
- Further our mission today

More on Gifts of Stocks and Bonds

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

Simple Steps for Giving a Gift of Securities

If you would like to make a gift of stock to TSF, we would be happy to provide stock transfer instructions to you. It is a simple, straightforward process.

TSF will provide you with the name of our brokerage firm, DTC number, and the account name and number. Contact us at tsf@sts.org and request our stock transfer instructions. Please also provide the following to TSF, so we can know exactly who is sending the donation:

1. Name and mailing address
2. Type of stock (ticker symbol)
3. Number of shares

You can call or write to your broker, bank, or investment advisor and ask that they initiate a transfer. You would instruct your broker to donate the stock directly to TSF.

Your broker can then transfer the securities directly to TSF's account. It is important that the securities be transferred to TSF's account prior to being sold in order to avoid capital gains taxation.

Once the donation is complete, TSF will provide you with a confirmation letter and tax-receipt for you to use when filing your taxes.

Please consult your advisor about how the tax rules apply to your contribution.