



## **Giving Securities**

### ***The Foundation for the History of Women and Medicine***

By making gifts of appreciated securities (as opposed to selling the securities first and then donating proceeds) you can avoid paying capital gains tax on the appreciation and claim a charitable deduction for the full market value.

An easy way to give securities is to have them electronically delivered by your broker via DTC to our gift account located at Susquehanna Bank. Below are procedures as well as delivery instructions that should be followed when electronically transferring securities:

1. **Prior to Delivery** of the security have your broker complete the attached Gift of Securities Notification Form and fax it to:

The Foundation for the History of Women and Medicine  
Attn: Stephanie Shoemaker/Victoria Burkhart  
Fax#: 610-970-7520  
Phone: 484-945-2106

**It is extremely important that this step be completed prior to the transfer of any security.**

2. Your broker transfers the stock using the following instructions:

Susquehanna Bank  
DTC# 031205955  
Account #20002359626

Please contact FHWIM to discuss transfer methods for Government Securities or mutual funds as the instructions provided are only for DTC eligible securities.

# The Foundation for the History of Women and Medicine

## Gift of Securities Notification Form

Name of Donor: \_\_\_\_\_

Address: \_\_\_\_\_

Donor's Telephone Number: \_\_\_\_\_

Broker & Broker DTC# \_\_\_\_\_

Broker Contact Name & Phone Number: \_\_\_\_\_

Security being donated: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Date of Gift (date of transfer) \_\_\_\_\_

Mean Value on day gift is transferred \_\_\_\_\_

Please use this gift for the following purpose \_\_\_\_\_

I wish to remain anonymous     Yes     No

**Important:** Even if you wish to remain anonymous, please provide your name and address so we may send a letter confirming receipt of your gift. We request a phone number in the event that we have a question about your gift and need to contact you. Thank you!

**Fax to:**            The Foundation for the History of Women and Medicine  
                          Attn: Stephanie Shoemaker/Victoria Burkhart  
                          Fax#: 610-970-7520  
                          Phone#: 484-945-2106