

Gifts of Appreciated Stock - Guidelines



The Dermatology Foundation is a 501(c)(3) charitable organization. Gifts to the Foundation, including gifts of unrestricted stock, are deductible to the extent provided by law.

The easiest way to make a gift of stock is outlined below. This process is based on the premise that it is ordinarily more beneficial to the donor to give the actual unrestricted securities that have a capital gain and have been held for more than one year rather than to sell the securities and contribute the proceeds.

- The donor must write a letter of authorization or send the following Stock Gift Transfer form to his/her personal broker -- [with a copy to the Foundation](#) -- instructing the transfer of a given number of negotiable shares of named stock to the Dermatology Foundation.
- The donor's broker then contacts the Foundation to arrange a wire transfer of the securities directly to the Foundation's broker.
- Foundation policy is to sell the stock immediately upon receipt—with the required stock power if applicable—and credit the donor with a contribution equal to the stock's value on the date of transfer. ***To do this, it is imperative that the donor complete the following document and fax or mail a copy of it to the Foundation. Without this information, the Foundation will not be able to identify and properly credit the contribution to the donor.***

If you are interested in bequests or other forms of deferred giving, please contact the Foundation office.

Sandra Rahn Benz, Executive Director
Dermatology Foundation
1560 Sherman Avenue, Suite 870
Evanston, IL 60201-4808
Voice: (847) 328-2256
Fax: (847) 328-0509

Stock Gift Transfer Authorization



Broker Name: _____

Broker Address: _____

Date: _____

Gentlemen:

Kindly withdraw _____ shares of _____
(Number) (Name of negotiable stock)
from my account number: _____ and transfer them to
the Dermatology Foundation.

The transfer should be a wire transfer to the Dermatology Foundation's broker:

Smith Barney, DTC # 0418; DF account #253-19471-13.
The Dermatology Foundation's FEIN tax number is: 04-6115524

Kindly forward a copy of this letter directly to the Foundation so my contribution
is properly credited:

Dermatology Foundation
1560 Sherman Avenue, Suite 870
Evanston, IL 60201-4808
FAX: 847-328-0509

Authorized Signature: _____

Client Name: _____

Client Address: _____

