

## Donation of Securities to AMWA

Gifts of appreciated publicly-traded securities held more than one year are a wonderful way to contribute to AMWA

As always, we suggest you consult a tax professional before making a gift of securities, however, a gift of securities qualifying as long-term capital assets may be fully tax-deductible at the fair market value on the date your gift is received. (See [IRS Publication 526](#)). An added benefit is that by contributing securities directly to AMWA you may avoid capital gains tax that would be due if you sold the securities yourself. As a 501(c)(3) charitable organization, AMWA can sell donated securities tax-free and use 100% of your gift toward the Annual Campaign.

### *How do I make a gift of securities?*

1. Please download this [Stock Donation Letter](#) to get started.
2. Contact your broker to verify their preferred method of receiving the letter (original or fax).
3. Complete, sign and send the letter directly to your broker with the information required to complete the transfer.
4. **Please email us the name of the stock and the number of shares to be donated prior to or on the same day you initiate the transfer to [Rick.Berry@morganstanley.com](mailto:Rick.Berry@morganstanley.com) and [associatedirector@amwa-doc.org](mailto:associatedirector@amwa-doc.org).**
5. If you wait to notify AMWA, the tax receipt will be delayed.

### *How will my securities donation be valued?*

For securities that freely trade daily, AMWA values your donation using the mid-point price between the high and low price on the date that the stock is received into AMWA's account. Please note that while most transfers happen in a few days, some transfers may take weeks to be received. It is the transferring broker that generally controls how long the transfer process takes, and that AMWA is not responsible for price fluctuations that may occur between the date you provide your broker with instructions and the date the securities are received into AMWA's account.

### *How do I know that AMWA received my donation?*

After the shares have been received, we will send you a letter confirming details of the donation. You will be able to use this letter to claim the appropriate deduction on your tax return for the tax year in which the donation was made.

### *Can I donate any type of security to the Annual Campaign?*

Not necessarily. You may donate any securities that are freely tradable on the NYSE, AMEX, or NASDAQ exchanges immediately upon receipt by AMWA. If you have any doubt as to whether the securities you propose to donate are freely tradable, please discuss this matter with AMWA's Portfolio Manager, [Rick.Berry@morganstanley.com](mailto:Rick.Berry@morganstanley.com) prior to initiating the securities transfer.

### *Who can I contact with questions concerning my securities donations?*

If you have any questions regarding these procedures, please contact AMWA's Portfolio Manager at Morgan Stanley at [Rick.Berry@morganstanley.com](mailto:Rick.Berry@morganstanley.com).

Rick Berry, **Senior Portfolio Manager**  
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