

# Securities



**St. Jude Children's  
Research Hospital**

ALSAC • Danny Thomas, Founder  
*Finding cures. Saving children.*

# Securities

You may be able to make your charitable dollars go further by donating appreciated securities, such as publicly traded stock, bonds, or mutual fund shares to a qualified charity such as St. Jude Children's Research Hospital. Appreciated securities are investments that have increased in value from the time they were purchased. By taking advantage of certain IRS tax incentives, you can claim a charitable tax deduction for the full, fair market value of the securities, and pay no capital gains tax on the transfer.

## THINGS TO REMEMBER

- To take full advantage of the tax benefits, give securities you have owned for longer than one year. Your charitable deduction for securities that you have held for less than a year will be limited to the amount you paid (your cost basis) for the securities.
- Do not sell appreciated stock before making your donation. Even if you donate the proceeds of sale, IRS will impose capital gains tax on your sale, eliminating the benefits of this way of giving.
- If you wish to donate depreciated securities, sell the asset first and contribute cash.

Publicly traded securities may be transferred electronically from a brokerage account to St. Jude Children's Research Hospital or another charity.

## STOCK INSTRUCTIONS FOR ST. JUDE

### *Electronic Delivery*

Depository Trust Company (DTC)  
ID #0226 – for credit to  
St. Jude Children's Research Hospital, Inc.  
Account #003-314773 at  
First Tennessee Brokerage  
P.O. Box 240655  
Memphis, TN 38124

### *Mail Physical Stock Certificates to:*

ALSAC/St. Jude Children's Research Hospital  
Attn: Accounting  
501 St. Jude Place  
Memphis, TN 38105

*To ensure that your gift is properly credited, you should always contact St. Jude before you make the gift.*