

STOCKS AND OTHER SECURITIES

St. Jude patient David
and his doctor



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

Finding cures. Saving children.

ALSAC • DANNY THOMAS, FOUNDER

STOCKS AND OTHER 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. Appreciated securities are investments that have increased in value from the time they were purchased. By taking advantage of certain IRS tax incentives, you may be able to 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, the IRS will impose capital gains tax on your sale, eliminating some of 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 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 notify St. Jude before you make the gift.