



Making a gift of stock to the American Medical Association Foundation

Making a gift of stock to the American Medical Association Foundation (AMA Foundation) is easy and rewarding. Your gift will have a beneficial impact on the programs of your choice, and you will receive considerable tax benefits.

- ❑ If you have owned the stock for at least one year, your gift qualifies for a tax deduction based on the full market value of your stock up to 50% of your adjusted gross income (AGI); and, you avoid the capital gains tax that would otherwise arise from the sale of this stock.
- ❑ If you have owned the stock for less than one year, your gift also qualifies for a tax deduction based on the full market value of your stock, however, deductions are limited to not more than 30% of AGI; you also avoid capital gains tax that would otherwise arise from the sale of this stock.

To make a gift of stock

1. Contact the AMA Foundation for the information that your broker or financial advisor will require to make the stock transfer:
 - DTC Number
 - Brokerage Name
 - AMA Foundation Account Number
 - Brokerage Contact Person
 - Brokerage Phone Number
2. Notify your broker or financial advisor that you wish to make a direct transfer of a specific number of shares of a named security that you own to the AMA Foundation.
3. Notify the AMA Foundation of your gift. For us to properly track your direct stock transfer, we need to know in advance that the gift is coming to us. Write, fax, or call to tell us:
 - Your name
 - The name of the security you are gifting to us
 - The number of shares you are gifting
 - The approximate date the gift is being made
 - Your instructions about where within AMA Foundation you wish to direct your gift

We can also assist you with a gift of shares of a mutual fund, direct transfer of IRA assets, and non-electronic stock transfers.

For more information or to make a stock gift, please call Tom Nowak at 312-464-4543, e-mail thomas.nowak@ama-assn.org, fax 312-464-4142, or write:

Thomas Nowak, Chief Financial Officer
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