

THE UNITED STATES AIR FORCE ACADEMY
ENDOWMENT

Stock Donation Information

Thank you for your consideration in making a charitable gift through the USAFA Endowment to benefit the Air Force Academy.

A current donation utilizing securities which have grown in value will enable you to utilize a charitable deduction, presuming you itemize on your Federal tax return.

Gift of publicly traded stock, bonds or mutual funds

Using investments which you have held for longer than 12 months to make a gift allows you to deduct the full market value (based on date the stock is received by the USAFA Endowment's broker), without incurring capital gains. You are permitted to use as a charitable deduction up to 30 percent of your AGI (adjusted gross income). The process to effect a gift is to instruct your broker or investment manager to make an electronic transfer. See the attached information sheet. If you hold an actual stock certificate (rare), contact us for transfer details.

Gift of non-publicly traded securities

The IRS allows the charitable donation of certain securities not publicly traded, including those of closely-held corporations, S-corporations, restricted stock, and some stock options. However, each such class of securities has specific requirements for a transfer; contact us for more information.

You may designate your gift to achieve your desired objectives for supporting the Academy. The donation of securities may also be used to realize other benefits for you, such as income-for-life through charitable trusts or annuities. I stand ready to provide information and assistance as you explore these opportunities.

THANK YOU!

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STOCK TRANSFER INSTRUCTIONS

- I. Donors can instruct their financial institution to transfer securities electronically via "DTC" to the USAFA Endowment, Inc. at:

VANGUARD BROKERAGE SERVICES

DTC Number: 0062

For further credit to: USAFA Endowment, Inc

Account number: 66118829

- II. To ensure that the contribution is receipted in an expedient manner, please communicate the stock transfer request in writing or electronically to the USAFA Endowment, Inc. using the Sample Letter on Page 2 as a guide. Information to include in letter or e-mail: name of donor, name and number of shares donated, and reason/campaign for which the donation is being made. If emailing, please copy Dennis Scruggs, Chief Financial Officer, at dennis.scruggs@usafaendowment.org

Gift of Marketable Securities to USAFA Endowment, Inc.

STOCK TRANSFER LETTER

Donor Name and Address:

Date:

Donor Brokerage Firm:

Dear _____:

Please transfer a charitable donation of _____ shares of _____ from my account # _____ to the brokerage account of the USAFA Endowment, Inc.

Vanguard Brokerage Securities
DTC #0062
Account #66118829

A copy of this letter has been sent to the USAFA Endowment, Inc. and to its broker, Vanguard Brokerage Services.

Check one:

- This is an unrestricted gift to the Endowment and may be used at the discretion of the Board to advance the mission of the USAFA Endowment and the Air Force Academy.
- This is a restricted gift to the Endowment and must be used for _____
- This gift is to be applied against my pledge, dated _____ to the Endowment.

Thank you,

(Signature)

CC: Dennis Scruggs, Chief Financial Officer, USAFA Endowment, Inc.
Vanguard Brokerage Securities