



Society of American Military Engineers Foundation

★ Established 2016 ★

Dear SAME Foundation Donor,

On behalf of the SAME Foundation, thank you for your interest in donating to the Foundation using appreciated securities. Not only does this type of donation go 100% to the Foundation's funds, but it also provides the donor a tax deduction in the total value of the securities on the day transferred, regardless of the cost basis originally made in the investment. This is assuming the donor itemizes deductions for their Federal Tax Return. It is not possible to take a charitable deduction without itemizing.

To make a donation of appreciated securities, contact your broker and provide these instructions:

Wire Instructions

Bank Name: **Citibank NA**

Bank Address: **399 Park Ave, New York, NY 10022**

Routing number: **021000089**

Account name: **Charles Schwab & Co., Inc.**

Schwab bank account number: **4055-3953**

For further credit to: **Society of American Military Engineers Foundation**

For further credit to: **SAME Foundation account number: 5528-3409**

**Please include the donor name unless anonymity is specified.*

Securities Transfer Instructions

Schwab account name: **Society of American Military Engineers Foundation**

Schwab account number: **5528-3409**

Delivery to DTC Clearing: **0164, Code 40**

**Please include the donor name unless anonymity is specified.*

Tell them which stock you want transferred and how many shares. Make a note of both and inform SAME so that we can inform the Foundation's financial managers to watch for the donation. Send this information to Kathy Off at Koff@same.org and to James Black at jblack@same.org. **It is imperative that we know to whom to credit the donation for tax acknowledgement and thanks!**

Once the transfer is made, the Foundation's broker will sell the securities and deposit the proceeds into the Foundation's account. The value of the donation is determined by tax law, which is the average of the highest and lowest stock price on the date of the donation. The donor will receive an acknowledgement letter from SAME indicating this value which can then be used as a charitable deduction in the tax year that the donation was made.

If a donor has any additional questions regarding how to process a charitable deduction on their tax return, please contact a tax professional for advice specific to their situation.

Again, thank you for choosing this method for making a donation to the SAME Foundation. Both the donor and the Foundation benefit from this exchange.

Respectfully,
SAME Foundation