



TRANSFER LETTER
Gift of Securities

Military Assistance Mission provides this form letter to assist the contributor in instructing his/her broker to transfer securities as a donation to Military Assistance Mission. Military Assistance Mission processes gifts of stock regardless of agency/agencies designated to receive the gift. Please:

Fax or mail completed letter to your broker, AND

Fax, mail, or scan/email a copy of the completed letter to Military Assistance Mission
to ensure that you receive proper credit for your gift and acknowledgment for tax reporting:

FAX/MAIL/EMAIL copy to: **Military Assistance Mission** plannedgiving@azmam.org
 515 E Carefree Hwy Ste 971 **TEL: 602-246-6429**
 Phoenix, AZ 85085 **FAX: 602-246-6421**

Date:					
Broker Contact Name:					
Brokerage House:					
Street:					
City:	State:	ZIP Code:			
Broker Telephone No:	Broker Fax No:				
Account No:					
Securities:					
No. of Shares:	Estimated Value:				
Securities:					
No. of Shares:	Estimated Value:				
Securities:					
No. of Shares:	Estimated Value:				

Please accept this letter as your authorization to deliver the securities from my account, referenced above, to the account of **Military Assistance Mission**, per the following instructions:

LPL Financial Account # xxxx-xxxx (Account information provided upon form completion)
C/O Military Assistance Mission DTC #0075
Contact: Brian Robinson, CFP® TEL: 480-999-3033

Print Name	Social Security No	Telephone No		
Grantor's Signature		Grantor's Signature if jointly owned		
Street	City	State	Zip	



INSTRUCTIONS for a Gift of Securities

Benefits of giving securities:

Avoid capital gains taxes by contributing securities that have appreciated in value to Military Assistance Mission. Grantor avoids the capital gains taxes they would otherwise owe if they sold the securities for their personal benefit.

Take a charitable tax deduction:

For federal income tax purposes (including alternative minimum tax purposes), you can deduct the value of the securities on the date of your contribution. The net value of your contribution is the average between the high- and low-quoted selling price on the date that the securities passed from your control. Your gift will be acknowledged in writing by Military Assistance Mission for tax purposes.

Give a larger gift:

A gift of stock may allow you to make a larger charitable contribution than would be possible with cash or payroll deduction.

How to give gifts of stock:

To contribute shares that are held at your brokerage house, trust department or financial institution, do the following:

1. Notify: Margy Bons TEL: 602-246-6429 plannedgiving@azmam.org
2. Complete the attached Transfer Letter that you can use to direct your broker to transfer stock directly to Military Assistance Mission's brokerage account.

NOTE: Shares must not contain any legends or restrictions and must be securities which are traded on the major exchanges (NYSE or NASDAQ). Bulletin board/OTC stock is not able to be accepted.



BENEFITS of a Gift of Securities

Putting a gift of stock to work for you:

Assume you purchased 100 shares of Helpful People Corporation in 1990 for \$2,000. Today, the shares are worth \$10,000. If you sold the stock, you would realize a \$8,000 capital gain. With current tax rates, you could owe as much as \$1,600 in federal capital gains tax.

You decide to make a \$10,000 charitable gift to Military Assistance Mission. You usually make your gift by payroll deduction or check, but decide to see whether a gift of stock would be more cost effective for you. Your comparisons are (federal tax benefits only) as follows.

<i>Give securities as gift</i>	<i>Sell securities and give cash</i>	
\$10,000	\$10,000	<i>-Proceeds of sale</i>
\$0	\$1,600	<i>-Capital gains tax paid (assuming 20% tax rate)</i>
<u>\$10,000</u>	<u>\$8,400</u>	<i>-Net gift to Military Assistance Mission</i>
\$3,960	\$3,326	<i>-Tax savings of charitable deduction assuming ordinary income tax rate of 39.6%</i>

The above savings are realized only when stock is transferred directly to Military Assistance Mission. Sale of stock and donation of proceeds may subject donor to capital gains tax. This example illustrates the potential value of a stock gift and highlights some of the maximum available benefits. These benefits depend upon a number of things, including the amount of the stock's appreciation, your adjusted gross income and current federal/state tax rates. We strongly advise that you contact your accountant or other tax advisor to determine the exact income tax effect of any donation.