



Donating Appreciated Securities

Giving appreciated securities offers two distinct advantages. You can deduct the current fair market value of the asset when you donate it. You also avoid paying the capital gains tax on the appreciated value of the asset. This applies to bonds, stocks, and mutual funds that you have owned for more than one year and that have increased in value.

SIR Foundation has an easy, convenient system for donors who wish to make a gift of stock. Through a special arrangement with Wachovia Securities, LLC, which provides this service at minimal cost, donors can use one of these simple procedures:

1. Electronic Transfer

- A. Email donate@SIRFoundation.org to alert us that you are sending a donation.
- B. Donors can have stocks electronically transferred from their individual brokerage accounts to the SIR Foundation's account at Wachovia. Donors should instruct their financial advisors to electronically transfer the stock using the following instructions:

DTC #0141, Wachovia Securities Financial Network, LLC

FBO: Society of Interventional Radiology Foundation

Account No. 1973-3523

For Further Benefit: SIR Foundation Discovery Campaign

Donor: *Your Name to Ensure Proper Recognition for Your Generous Donation*

2. Certificates

Donors making gifts in certificate form should sign a Stock Power and a letter of authorization donating the item to the SIR Foundation and send the documents via certified mail to:

**The Olcott Consulting Group
2010 Corporate Ridge, Suite 560
McLean, VA 22102**

Questions regarding either of these procedures may be addressed to Ms. Linsey Tokar at the Olcott Consulting Group, 703-720-5980.

Notifications

SIR Foundation can be reached by telephone at 703-691-1805; by e-mail; donate@SIRFoundation.org; or by mail at: 3975 Fair Ridge Drive, Suite 400 North, Fairfax, Virginia 22033.

**We encourage you to contact your attorney, accountant or financial advisor
to discuss the specifics of your particular situation.**