

Gifts of Appreciated Stock

Turning stock market gains into **community good**.



Everybody wins when you make a gift of appreciated stock to your community foundation.

It's easy and rewarding to do:

- You make a gift of appreciated stock to your community foundation
- Your gift can be placed in any of our charitable funds. For example, you can use your gift to create a Donor Advised Fund in your name or your family's name. You can then stay involved in recommending uses of your fund... so you can direct your gift to the charitable causes you care about most
- Your gift qualifies for a tax deduction based on the full market value of your stock; plus, you avoid the capital gains tax that would otherwise arise from the sale of this stock
- With gifts of appreciated stock, your stock market earnings translate into community good, so you get a more rewarding return on the fastest growing stocks in your portfolio

Who donates gifts of appreciated stock?

Giving appreciated stock through a community foundation is a popular vehicle that appeals to a range of givers — individual investors, families, entrepreneurs, and even groups of friends who've formed investment clubs.

It's a simple, smart way to turn your stock market gains into community good.



PUTTING STOCK IN YOUR COMMUNITY

“A booming stock market provided the means for giving more back to our community,” according to Joanne and Gerald Johnson. So they joined the ranks of donors who choose to contribute appreciated stock to open a Donor Advised Fund. Last year, the Johnsons helped fund a local family outreach program, the United Way, and the Girl Scouts of America. “Some of our charities are too small to accept direct stock gifts,” notes Joanne. The Johnsons receive a tax deduction on the full market value of their appreciated stock, while avoiding the capital gains tax that would otherwise arise from sale of this stock. Says Gerald: “It’s a good, smart way to give.”

Why donate gifts of appreciated stock?

You can use your stock to establish a charitable fund that benefits the local agencies and programs you care about most. Set up a scholarship fund. Support special programs for at-risk youth, senior citizens, AIDS patients, or other people in need. Address environmental concerns. Support the arts. We'll help you fulfill your personal charitable goals. And we can do it through a fund established in your name, in the name of your family or business, or in honor of any person or organization you choose.

Plus, you receive special tax advantages — including a tax deduction on the full market value of your gift, and the ability to avoid the capital gains tax you'd normally pay when selling appreciated stock.

Putting stock in charity is a good thing for everybody.



“Stock certificates have become the new currency of charity.”

EMORY THOMAS, JR.
MSNBC CORRESPONDENT

TEN REASONS PEOPLE CHOOSE TO GIVE THROUGH COMMUNITY FOUNDATIONS

1. We build **endowment funds** that benefit the community forever (by investing principal, then using investment income to make charitable grants).
2. We help donors establish a **personal legacy** by creating permanent funds in their names.
3. We offer ways for donors to **stay involved** in identifying uses for their charitable gifts.
4. We are **local organizations** meeting a broad range of ever-changing local needs.
5. We are a simple way to fulfill **multiple charitable interests**; donors can give through us to a number of non-profit organizations.
6. We provide **personalized donor service** to support each donor's unique charitable interests and financial circumstances.
7. We accept a **wide variety of assets**; donors can make gifts of cash, appreciated stocks, bonds, real estate, or personal property.
8. We offer **maximum tax advantage** under state and federal law.
9. We help **preserve donor intent** even if an organization receiving grants ceases to exist in the future.
10. We practice **prudent stewardship** and carefully manage each fund.