



FROM WALL STREET TO OUR STREETS:

How Giving Stock Can Help Maximize Your Charitable Impact and Return

Donating stock directly to charity is one of the most tax-smart ways to give. Yet, it is often not well understood or widely used.

Studies show 80% of donors own appreciated assets, such as stocks, mutual funds or bonds, but only 10-20% percent of those donors have contributed these types of assets to charity.

HOW IT WORKS

STOCK/BOND DONOR (YOU)

1

You give securities to a charitable organization...

2

... and qualify for an income tax deduction.

CHARITABLE ORGANIZATION

3

The charitable organization sells securities...

4

...and receives cash to use for your gift's purpose.

TAX BENEFITS

- ✓ Avoid Capital Gains Tax on appreciation
- ✓ Income tax deduction for fair market value of securities
- ✓ Ability to deduct gifts up to 30% of Adjusted Gross Income

FINANCIAL PLANNING BENEFITS

- ✓ Keep cash liquidity by giving securities
- ✓ Reduce single security portfolio concentration
- ✓ Avoid future Capital Gains Tax
- ✓ Allow assets to grow and have greater impact outside of your estate

