

Why now is a great time to make a gift of Appreciated Stock



What is a Gift of Appreciated Stock?

- Donors who own appreciated stock (held more than one year) can make a gift directly from their brokerage account to support your cause.
- Gifting appreciated stock is one of the most effective means of tax savings.

Why do donors like this gift option?

- Satisfaction of knowing your money is invested in a cause important to you.
- Capital gains taxes on the stock are avoided.
- Donors are eligible to receive an income tax charitable deduction for the full fair-market-value of the stock at the time of the gift.
- It is easy to make — you simply notify your broker.
- It minimizes the effect on cash flow; the gift is from assets, not your checkbook.

This information should not be considered legal or financial advice. You should consult with an attorney or other professional to determine what may be best for your individual needs.