

ADVANTAGES OF DONATING APPRECIATED SECURITIES AND STOCKS

Donating Stock to the [GERMAN INTERNATIONAL SCHOOL NEW YORK](#)

Receive an immediate tax deduction for the full amount of the fair market value of your stock, as well as bypass capital gains tax liability on your appreciated stock. Transfer your securities directly to our account below for your tax-deductible donation.

Why give stock instead of cash? Here's how it works:

CASH DONATIONS

When you donate cash to GISNY, we give you a receipt and you get to deduct the amount donated from your taxable income and thereby reduce your tax.

For instance, if you pay 30% tax, a \$1,000 donation means you get to deduct \$1,000 from your taxable income and save the 30% tax you would normally have paid on that income, or \$300. In other words, you donated \$1,000 but got \$300 back from the government, so your out-of-pocket was only \$700 ($\$1,000 - \$300 = \700).

STOCK DONATIONS

When you donate stock worth more than what you originally paid for it ("appreciated securities"), you get to deduct the full value of the stock as of the day you donated it from your taxable income. You do not have to pay the capital gains tax on the difference between what you paid and the value today. The same donation of stock can save you more in taxes than one of cash.

For instance, let's assume you own 100 shares of ABC Company that you bought for \$5 per share, or \$500 in total. Let's also assume that they are now worth \$10 per share, or \$1,000 in total, and you donate them to GISNY. You will receive a receipt for the \$1,000, just as if you had donated \$1,000 in cash. You now get to deduct \$1,000 from your income and save the tax you would normally have paid on that income: 30%, or \$300. Just like in the example above, you get \$300 back on your taxes. However, you only paid \$500 for the stock in the first place. So your out-of-pocket isn't \$700 but just \$200 ($\$500 \text{ paid} - \$300 \text{ gotten back} = \200). In this example, you make a \$1,000 donation at a cost to you of only \$200.

Normally, if you sold the stock first, you would have to pay 30% tax on the gain and have only \$850 of cash left ($\$1,000 - \$500 = \500 gain, then, 30% tax on the \$500 gain = \$150 tax, so $\$1,000 - \$150 = \$850$ cash left). However, by donating stock, you avoid the capital gains tax and can donate more (\$1,000 instead of \$850).

"Do other charities do this?" Yes, religious charities, schools, volunteer fire departments, medical charities, you name it.

"Have any donations like this taken place yet?" Yes, we have done this before.

"Great. What do I do?" Just contact your broker that has your securities account – they can transfer it for you. Please provide your broker the "DTC number 0226" and reference the GISNY account information below. Also, fill out and submit the GIFT OF STOCK FORM to let us know it's coming so we can get you the receipt. The account to which securities should be transferred is:

Bank Name: Fidelity Investments

Account Type: Brokerage

Account Number: Z40304265

DTC Number: 0226

Account Name: German Int'l School New York

Still have questions?

Please email to busmgr@gisny.org or call +1 914 948 6513

The Moral: DON'T SELL STOCK THAT HAS APPRECIATED!
DONATE IT TO THIS WORTHY CAUSE

NURTURING

Independent Thinkers



Stock Donation Instructions for Fidelity Investments:

Thank you for your support of the **GERMAN INTERNATIONAL SCHOOL NEW YORK** ("GISNY"), a recognized 501(c)3 charitable organization. GISNY is proud to support our students with rigorous academic instruction including an emphasis on critical thinking, in a multi-lingual, cross-cultural setting, to help them grow into socially and environmentally aware global citizens. GISNY promotes open-mindedness, tolerance, and global awareness. We strive to foster and develop the German and English languages and promote German, Austrian, Swiss, and American culture and build bridges between cultures. We aim to instill confidence and motivation, while supporting independent and critical thinking. We take responsibility for our fellow citizens and environment and consider the use of natural resources conscientiously. With your gift, you help us in our pursuit of all these goals.

We, our Board, our students, and our community sincerely thank you.

Prior to the initiation of your stock transfer, please note that donations without identification may result in a delayed issuance of a tax-deductible receipt.

Once the transaction is complete, please kindly notify us at busmgr@gisny.org and include the donor's name, contact information (email and mailing address for tax receipt purposes), ticker symbol, designation of the gift, and number of shares donated.

Stock Details

Bank Name:	Fidelity Investments
Account Type:	Brokerage
Account Number:	Z40304265
DTC Number:	0226
Account Name:	German Int'l School New York

If you have any questions, please feel free to contact:
GISNY Business Manager | busmgr@gisny.org | +1 914 948 6513

Tax ID:
United States (EIN 13-3051551)

Opening a **WORLD**
of Opportunities



GIFT OF STOCK FORM

Please complete the information below to notify GISNY of your gift and help ensure it is processed accurately. Please fax or email the completed information to +1 914 948 6529 or busmng@gisny.org.

Donor & Securities Information:

_____/_____/_____
Name & Type of Securities (e.g.: DELL common stock) Security Symbol Number of Shares Transfer Date

Donor Name (Individual, Corporation, Foundation)

Donor Street Address

Donor City / State / Zip

Broker Name

Broker Company / City / State

Broker Contact / Telephone Number

Donor Telephone / Email Address (to be used only if a question arises in the donation process)

_____/_____/_____
Donor Signature Date Signed Donor Signature Date Signed

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering GISNY as the recipient of your charitable gift.

Inspiring

ACADEMIC EXCELLENCE

