

# GIFTS OF STOCK AND APPRECIATED ASSETS

*Giving stock can be more beneficial than giving cash!*



## How It Works

- You transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to {Our Organization}.
- {Our Organization} sells your securities and uses the proceeds to fund a program at {Our Organization} that you choose.

## Benefits

- You receive an immediate income tax deduction for the fair market value of the securities on the date of transfer.
- You pay no capital gains tax on the transfer when the stock is sold.
- Giving appreciated stock can be more beneficial than giving cash. The “cost” of your gift is often less than the deduction you gain by making it.

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*For more detailed information, please contact us so that we can assist you through every step of the process.*

### John Doe

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