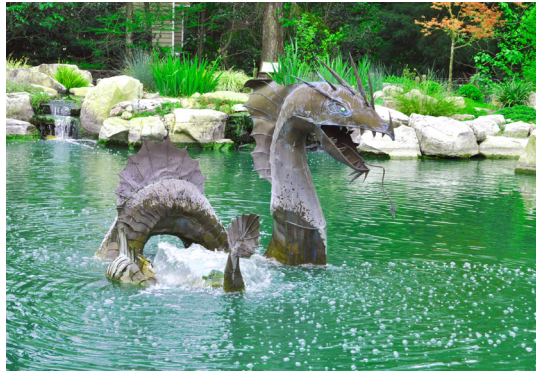


STOCK OR SECURITY TRANSFER (Appreciated Stock Donation)



For investors who are charitably inclined, one giving option is making their donations using shares of appreciated securities. Whether using shares of individual stocks, ETFs or mutual funds, this can be a good strategy for financial advisers to discuss with their clients who hold appreciated securities inside taxable accounts.

Donating appreciated securities allows investors to contribute the market value of the security while eliminating any capital gains taxes that would be due if they were sold and the investor then donated the cash proceeds. This makes using appreciated securities a tax-efficient approach to charitable giving.

Action: Donor works with financial advisor or custodian to make arrangements.

BENEFITS OF A STOCK DONATION

Avoid capital gains on appreciated value of stock

Reduce tax liability for donor

If you normally take the standard deduction, you can make one large donation one year and itemize that particular year.

HOW A BEQUEST WORKS

With the help of your financial advisor/wealth manager or the custodian of your stocks, you complete the paperwork to transfer the stock to the friends of the arboretum. They can also advise you on the tax treatment of the transaction.

CONTACT US

If you have any questions the donation of stock, please contact us at 910-798-7660.
We would be happy to assist you.



6206 Oleander Drive • Wilmington NC 28403 • 910-798-7660
friends-nhcarboretum.org • friendsofthearboretum@gmail.com