



HOW TO GIVE Appreciated Stock

Everybody wins when you make a gift of appreciated stock to Four County Community Foundation. Your gains are put to good use. Your gift of stock is reinvested in your community and it may qualify for an immediate tax deduction based on the full fair market value.

HOW IT WORKS

- You make a gift of appreciated stock to the community foundation.
- Your gift can be placed into any of our charitable funds. For example, you can use your gift to create a donor advised fund in your name, in the name of your family or business or in honor of any person or organization you choose. You can then stay involved in recommending uses of the fund.
- Your gift qualifies for a tax deduction based on the full market value of your stock; you avoid the capital gains tax that you would have to pay if the property was liquidated first.
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

GENERATING A RETURN FOR YOUR COMMUNITY

“Our stock returns provided the means for giving to our community,” Joanne and Gerald Johnson said. That’s why they joined the many people who choose to contribute appreciated stock to open a donor advised fund. Last year, The Johnson Fund supported a local family outreach program, a homeless shelter and a local theatre group. “Some of our charities are too small to accept direct stock gifts,” Joanne said. “Giving through the community foundation eliminates that barrier.” The Johnsons receive a tax deduction on the full market value of their appreciated stock, while avoiding the capital gains tax that would otherwise arise from sale of this stock. “It’s a simple, satisfying way to give.” Gerald said.



10 REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION

1

We are a **local organization** with deep roots in the community.

2

We have **broad expertise** regarding community issues and needs.

3

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

4

Our funds help people **invest in the causes** they care about most.

5

We accept a wide **variety of assets** and can facilitate even the most complex forms of giving.

6

We partner with **professional advisors** to create highly effective approaches to charitable giving.

7

We offer maximum **tax advantages** for most gifts under state and federal law.

8

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

9

We build **endowment funds** that benefit the community for decades and help create personal legacies.

10

We are a **community leader**, coordinating collaborative resources to create positive change.

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MORE BENEFITS

Giving appreciated stock through the community foundation is popular among a range of givers—individual investors, families, entrepreneurs and even groups of friends who have formed investment clubs.

By giving stock through the community foundation, you can avoid capital gains taxes that would be due as a result of its sale and establish a charitable fund that benefits the local causes and organizations you care about most. With gifts of appreciated stock, your stock market earnings translate into community impact, so you get a more rewarding return on your portfolio. You can set up a scholarship, support special programs for youth, senior citizens, or other people in need, address environmental concerns or support the arts.

LET'S CONNECT

Contact us to learn more about the ways we can help you have a positive impact on the community and causes you care about.



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