Gifts of

Stocks and Bonds



Increase Your Giving and Reduce Your Taxes While Supporting Our Cause

UNITED METHODIST MEN FOUNDATION
LEGACY GIVING FOR POSITIVE CHANGE

Make the Most of Your Investments - Save Money and Avoid Tax with Gifts of Appreciated Securities.

Did you know that making a charitable gift of appreciated stocks, bonds or mutual funds can save you taxes? Giving these investment assets is easier than you may think and it is one of the most tax-effective ways for you to make a gift to support the causes that matter most to you.



The Benefits of Giving
Your Investments to Charity

When you make a gift of your securities or bonds to a charitable organization like ours, you benefit in the following ways:

- You receive a charitable income tax deduction, often for the full fair market value of your gift. This translates into tax savings on your next income tax return!
- If you make a gift, rather than sell your appreciated investment, you can avoid capital gains tax otherwise due.
- Your gift may also help you avoid paying the healthcare tax on any net investment income.
- Because you are making a gift of an asset, your gift will not adversely affect your cash flow.
- Making gifts from your assets, instead of from your checkbook, may allow you to make a greater gift than you ever thought possible.

"Making a donation of appreciated stock allowed us to support the important causes we care about. Our gift was significantly greater than we could have given from our checkbook."

How Can You Make a Gift of **Securities and Bonds?**

Making a gift of your investments is an easy process. How you make your gift will depend on how you hold your assets.

Electronic Transfer

If you own assets in a brokerage or investment account, gifts are typically made electronically. We can provide you with instructions on how to transfer securities and bonds from your account to ours.

Certified Mail

If you hold securities in certificate form, you will need to mail two separate envelopes to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power form for each certificate.

Securities and Bonds **Gift Planning Strategies**

You can make a significant difference by making an outright gift of your investments. Consider the following strategies:

Outright Gift

One of the simplest ways to make a gift to support our mission is by giving us the asset outright. For example, you can transfer a few shares of stock.

Gift to a Donor Advised Fund

A donor advised fund (DAF) is a giving fund to which you can contribute an investment asset. Each year, you can make grants from the DAF to support the causes you care about.

Definitions

Appreciated Assets

Assets that have increased in value while you have owned them.

Charitable Income Tax Deduction

An individual who makes a gift to a qualified charity may take this deduction, if they itemize their deductions when filing their income tax return. These deductions are subject to certain limits each year and are usually based on the fair market value of the property donated to charity.



Let Us Help You

If you have any questions about making a gift of appreciated securities or bonds, please contact us. We would be happy to provide you with an illustration with your potential gift benefits.

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