

***INFO SNAPSHOT***

**Gifts of Appreciated Securities**

(Rev 12/8/23)

A gift of appreciated securities, such as a stock or mutual fund, is a great way to support our organization and the people we serve through your generosity. In fact, giving a stock that has appreciated in value is one of the **BEST WAYS** for you to benefit from your gift! Here are some of the **GREAT BENEFITS** of giving appreciated securities to our organization:

* ***You receive an income tax deduction based on the full “market value” of the stock.***
	+ The value is based on the average of the high and low closing prices as of the date the stock is received by our organization. Stock gifts are deductible up to 30% of your adjustable gross income!
* ***The “cost” of making your gift is less than when you give cash or checks!***
	+ Your cost is the amount you paid for the stock, unlike your cash gift which you would typically make from your paycheck or bank account!
* ***You would avoid all capital gains taxes that you may have incurred by selling the stock.***
	+ Capital gains rates of 15% or 20%, or ordinary income tax rates of as much as 39% on your “net capital gains” will be avoided by you!
	+ And our organization will NOT pay capital gains taxes when it sells the stock.
* ***Giving stock is as easy as letting your broker know that you want to make the gift!***
	+ We can provide you with our simple stock transfer instructions that you can provide to your brokerage representative to make your gift quickly and easily.
	+ Let us know of the details and timing of your stock gift, so we can watch for it!
* ***And you don’t even have to write a check!***
	+ Your stock will be transferred directly to our organization by your broker!

Let us help show you how a gift of appreciated securities may be right for you. **Please contact Sarah Knopf-Amelung at Amethyst Place at 816-343-4937 or** **sarah@amethystplace.org**for more information and our simple **STOCK TRANSFER INSTRUCTIONS**. Thank you!