

Making a Gift of Securities



Making a gift of securities offers you the chance to support work within your community while also receiving important personal benefits. Securities and mutual funds that have increased in value and been held for more than one year are one of the most popular assets to use. Through a gift of appreciated stock, you receive a charitable income tax deduction for the full fair market value of the securities, while also helping you avoid capital gains taxes on appreciated stock. This allows you to maximize your gift.

Steps to give

Step 1: Direct your broker or agent to transfer shares from your account into the "United Way of Marathon County" account at National Financial Services account number DCV000863, DTC # 0226.

Step 2: Please fill out the Gift of Stock form online at unitedwaymc.org/donate to notify United Way of Marathon County upon initiating the transfer of shares to ensure we credit the gift to you and issue a tax receipt for your donation.

Contact **Amanda Flannery** at aflannery@unitedwaymc.org or **715.298.5706** with questions about stock certificates, powers and additional paperwork, as well as notification of incoming stock transfers.

Items to Remember

The date of the stock gift is the day the right of ownership of the stock is effectively transferred to United Way.

The value for tax purposes is the mean between the high and low quoted selling prices on that day.

Your gift will be acknowledged by United Way with the valuation of your gift for tax purposes.

