

Gift of Appreciated Stock

Turning stock market gains into community investment.

Everybody wins when you make a gift of appreciated stock to your community foundation. Your gains are put to good use. Your gift of stock is reinvested in your community, and it qualifies for an immediate tax deduction based on the full market value.

Giving appreciated stock through a 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 your 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 at-risk youth, senior citizens, or other people in need; address environmental concerns; or support the arts.

Example Donor Story

Generating a return for your community.

"Our stock returns provided the means for giving to our community," say Joanne and Gerald Johnson. That's why they joined the many people who choose to contribute appreciated stock to open a Donor Advised Fund. Last year, the Johnsons helped fund 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," says Joanne. "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 the sale of this stock. Gerald says, "It's a simple, satisfying way to give." There is so much more we'd like you to know. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact [The Greater Round Rock Community Foundation](#)