

GIFTS OF STOCK

GEORGE WASHINGTON'S MOUNT ★ VERNON

THE MOUNT VERNON LADIES' ASSOCIATION

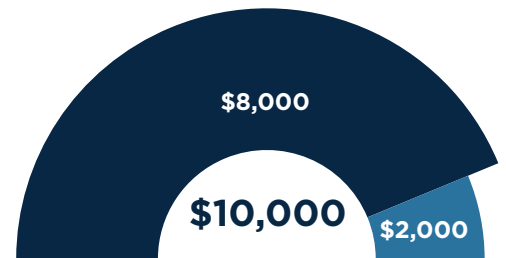
Unlock greater impact by donating stock instead of cash

Did you know giving stock is typically more beneficial to you than giving cash? Donating stock that has increased in value since you bought it can be one of the most tax-efficient ways to give.

HOW IT WORKS

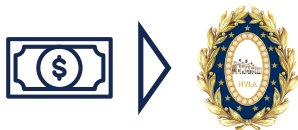
Mark and Linda typically donate **\$10,000** in cash each year to their favorite charity, the Mount Vernon Ladies' Association. This year, they donated appreciated stock instead—and the results surprised them.

- They have 100 shares of ABC Corp. and a long-term capital gains rate of 20%.
- **Cost Basis:** the shares were purchased for \$2,000
- **Current Market Value:** the shares are now worth \$10,000
- **This means the shares have embedded unrealized capital gains of \$8,000, and as it stands, Mark and Linda would pay \$1,600 (20%) in capital gains tax upon selling them.**



#1 MARK AND LINDA DONATE CASH

They keep their stock and donate \$10,000 cash.



They receive an income tax deduction of \$10,000.

#2 MARK AND LINDA SELL STOCK AND DONATE

They sell their stock and donate \$10,000 cash.



They pay \$1,600 in capital gains tax and receive an income tax deduction of \$10,000.

#3 MARK AND LINDA DONATE STOCK

They donate their stock and keep their cash.



They receive an income tax deduction of \$10,000 and save an additional \$1,600 in capital gains.

BY GIVING STOCK, MARK AND LINDA:

- ✓ received the same tax deduction that they would have for giving cash,
- ✓ saved \$1,600 in taxes they would have owed,
- ✓ gave the same amount to Mount Vernon, and
- ✓ cleared out low-basis stock with high embedded gains from their portfolio.

HOW TO GIVE STOCK TO THE MOUNT VERNON LADIES' ASSOCIATION



1. SELECT THE SHARES OF STOCK YOU WISH TO GIVE.

“Long-term:” Those you have held longer than one year.

“Appreciated:” Those with the highest appreciation (the highest amount of unrealized capital gains) typically save you the most in taxes.

2. TRANSFER THEM DIRECTLY TO THE MOUNT VERNON LADIES' ASSOCIATION.



Contact your financial advisor or brokerage to initiate the transfer of these shares in-kind to the Mount Vernon Ladies' Association's brokerage account:

Bank Name: Charles Schwab & Co.

DTC Number: Clearing 0164, Code 40

Account Name: Mount Vernon Ladies' Association of the Union

Account Number: 6031-5048



3. RECEIVE THE TAX BENEFITS ASSOCIATED WITH YOUR GIFT.

Receive an income tax deduction at market value.

Forego paying capital gains tax.

Donating stock can be a strategic way to rebalance your portfolio, minimize taxes, and give from your assets, not just your income.

To learn more or notify us of incoming stock transfers, please contact us!

support@mountvernon.org
703.799.8647

If you are ready to make your gift of appreciated stock today, please fill out our transmission form at www.mountvernon.org/wire-stock