

Advantages of Appreciated Stock

- Avoid capital gains tax. Any gain in the stock is taxable if you sell it yourself, but not if you donate it to Community Foundation of the Gunnison Valley
- Your charitable deduction for federal income tax purposes is based on the fair market value of the stock on the date the gift is made.
- Receive gift credit from the Community Foundation of the Gunnison Valley for the full fair market value of the stock.

How to Give a Gift of Stock

If your stock is held in a brokerage account, ask your broker to contact us for instructions on transferring the stock or detailed stock transfer instructions in PDF format can be found here. *(Note: you, as donor, must not direct the broker with any more instructions than to transfer the stock to the Foundation. If you direct the sale of the stock you would be liable for any capital gains tax incurred.)*

If you hold the stock certificate, please call us for instructions.

Valuation of the Gift

The value of a gift of publicly traded stock is based on the average of the high and low share prices on the date of the gift. The valuation date depends on the method of transfer.