

# Gifts of Stock and Other Securities



## *Consider a tax-saving gift of securities to the Bethesda Foundation*

### **Gifts of securities**

Giving long-term appreciated stock or mutual fund shares offers three-fold tax savings:

1. You avoid paying capital gains tax on the increase in value of your stock.
2. You receive an income tax deduction for the full fair-market value of the stock on the date of the gift, regardless of what the Bethesda Foundation nets when it sells the stock.
3. You may deduct up to 30 percent of your adjusted gross income with an additional five-year carry forward. The carry forward provision allows you to use the deduction in future years, spreading your deduction over six years potentially.

Other benefits of making gifts with securities:

- Such a gift may not impact your income stream as much as a gift of cash.
- Using securities may allow you to maximize the gift you wish to make.
- The gift process (electronic transfer in most cases) can be handled easily by your broker and the Bethesda Foundation Office.

### **An example:**

If you bought stock years ago for \$1,000 and it is now worth \$10,000, an outright gift of that stock to the Bethesda Foundation would result in a charitable deduction of \$10,000. In addition, you would avoid capital gains taxes on the \$9,000 of appreciation.

### **Before transferring your gift:**

Please contact: Stefanie Ryan, Bethesda Foundation Development Director at (320) 214-5600 or [stefanier@bethesdawillmar.com](mailto:stefanier@bethesdawillmar.com) and provide the following information:

- Your name
- Broker's name (individual/ company) and phone #
- Description of security issue and number of shares
- Gift designation (if any) (Capital Campaign, specific memorial fund, etc.)

It is important that you contact the Development Office before donating securities so that we can properly credit your gift.

### **How to transfer securities electronically:**

To transfer stock electronically, please give your broker or custodian the following information:

### **Gifts of DTC eligible securities:**

Deliver to DTC Clearing #: 2803  
For Credit to Account Number: 6731017160  
Name: Bethesda Foundation  
Attention: Sharon Jamison & Ziegler Capital Management

Bethesda Foundation's Tax ID # 41-1457903

Please ask your stockbroker or custodian to provide the donor's name at the time of the transfer.

### **Our brokerage account information:**

Name of Broker: Sharon Jamison  
Brokerage Company: U.S. Bank  
Address: 425 Walnut Street, Cincinnati, OH 45202  
Office: 513-632-4498  
Fax: 866-457-6497  
Telephone: 513-632-4498

### **Our Investment Manager:**

Contact Name: Kevin Carlson  
Company: Ziegler Capital Management, LLC  
Address: 70 West Madison Street, Suite 2400,  
Chicago, IL, 60602  
Direct: 312-454-6625  
Fax: 312-750-1131  
Office: 312-368-1442

### **For more information:**

Bethesda Foundation  
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