

### **‘Stock’ our Shelves with Your Donation:**

Make a larger impact by donating long-term appreciated securities, including stock, bonds, and mutual funds, directly to Eatonville Family Agency. Compared with donating cash, the selling of your appreciated securities and contributing the after-tax proceeds, you may potentially increase your gift and tax donation while enjoying significant tax benefits.

**Donations:** Charitable donations have often been associated with cash or in-kind contributions. However, many donors may not realize that they can also donate stocks, bonds, or other securities they hold. This option provides a win-win situation for both donors and nonprofits.

1. **Tax Advantages:** You (donor) receive tax benefits when you donate appreciated stocks. In doing so, you may avoid paying capital gains tax and receive a charitable deduction for the full, fair-market value donation. This may result in substantial tax savings, while also supporting our work.

2. **Donation Impact:** Our organization benefits from these donations as we can sell the securities without incurring capital gains taxes. This means more resources are available to fund our programs, furthering our impact in the community together.

### **How It Works:**

Donating stock to our nonprofit is a relatively straightforward process. The process typically works as follows:

1. **Contact us:** Begin by reaching out to our organization. We will provide you with an ‘Eligible Security Donations’ form to bring to your brokerage firm to complete the transfer.

2. **Transfer of Donation:** You will need to transfer the stock electronically from your brokerage account to the nonprofit's brokerage account. The form received in step 1 will provide you the account details, making the transfer seamless.

3. **Tax Deduction:** After the stock transfer is complete, you will receive a receipt for your tax-deductible donation. It is important to consult with a tax professional to maximize your tax benefits.

4. **The Nonprofit Sells the Stock:** Once we receive the donated stock, we will sell it and use the proceeds to further our mission.

### **Stock Donations:**

Our current ability to accept these donations speaks to our organizations commitment to adapting and embracing the changing times. Being prepared to accept these securities allows for a new source of funding while providing our supporters with another avenue to partner and sustain our People Helping People vision. Truly a win-win for all.

Email [bookkeeper@eatonvillefamilyagency.org](mailto:bookkeeper@eatonvillefamilyagency.org) for the Eligible Security Donations form.

Thank you for your support.