

# Stock and Securities Gifts



Donating appreciated stocks, bonds, or mutual funds is a meaningful way to support the Women's Fund of the Blue Ridge while potentially receiving important tax benefits.

If you have owned securities for more than one year and they have increased in value, you may be able to:

- Receive a charitable deduction for the full fair market value of the asset
- Avoid capital gains taxes on the appreciated value
- Make a significant impact through a tax efficient gift

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## How to Make a Gift of Stock

If your securities are held through a brokerage account, you may instruct your broker to transfer the shares directly to the Women's Fund of the Blue Ridge.

To help ensure proper acknowledgement and a timely tax receipt, please notify us in advance of your planned gift and provide the following information:

- Donor name
- Contact information
- Name of the security
- Ticker symbol
- Number of shares being transferred
- Expected date of transfer

Once notified, we will provide the necessary transfer instructions for your broker.

## Questions or Assistance

If you would like assistance making a gift of stock or securities, we would be happy to help guide you through the process.

Women's Fund of the Blue Ridge | 895 State Farm Road, Suite 404-10, Boone, NC 28607

✉ [info@womensfundoftheblueridge.org](mailto:info@womensfundoftheblueridge.org) | ☎ 828-264-4002

This information is provided for educational purposes only and should not be considered legal or financial advice. Please consult your attorney, tax advisor, or financial planner when making estate planning decisions.