



GIFTS OF PUBLICLY TRADED SECURITIES

Want to reduce your taxes payable? A donation of securities can be a great way to realize tax savings while supporting a cause you care about.

How they work:

By donating publicly traded securities – stocks, bonds, or mutual funds containing stocks listed on approved stock exchanges – you can receive a charitable donation receipt and avoid capital gains taxes.

If you sell your shares and donate the cash proceeds to TLC you will have to pay capital gains tax on the appreciated value of your securities, since you purchased them.

However, if you donate the shares **directly** to TLC you not only avoid the capital gains tax, you also receive a charitable tax receipt for the fair market value (FMV) of the securities. This tax receipt can then be used as a non-refundable tax credit, to reduce taxable income over the following five years.

Contact our office to receive a gift of securities share transfer form.

Who they work for:

Individuals who want to support TLC by donating securities that have appreciated significantly since their purchase.

IMPORTANT: TLC offers this information with the understanding that we do not render legal, accounting, or other professional advice. We recommend that you consult your own professional advisors to design the best plan for you.