

WHY DONATE STOCK

Donating appreciated stock is one of the easiest ways to give more to the causes you care about.

Maybe your stocks have appreciated greatly since you purchased them. Maybe a surge in value of one of your holdings has thrown your portfolio off balance. Maybe you just want to refocus on other investment categories. If you also give to charity, these scenarios should encourage you to review your investment portfolio with a donation strategy in mind.

Were you to sell stock and donate the proceeds, you would be required to pay capital gain taxes. However, when you *donate* stock, you avoid those taxes and 100% of the value goes directly to the nonprofit. Plus, you are eligible to deduct the entire fair-market value of the donated asset!

HOW TO DONATE STOCK

STEP 1

Transfer your stock via DTC to the UJF account at Merrill Lynch
Stocks should be transferred via Depository Trust Corporation (DTC) to our account at Merrill Lynch.

STEP 2

Notify UJF of your donation.
Lara Agatstein, Director, Office Operations
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UJF is not notified by the brokerage account of transfers. Help us appreciate your generous support by letting us know the name and number of securities that you donate as soon as you sell the stock.

If you have any questions or would like more information, please reach out to your financial advisor or Lara Agatstein at Lara@ujf.org