



***Smart Giving:* Stock & Mutual Funds**

***Would you like a double tax benefit and to be the philanthropist of your dreams?
Think about a gift of appreciated stock or mutual funds.***

Giving appreciated stock or mutual fund gifts to charity generates a double tax benefit. In addition to receiving an income tax deduction, the donor escapes any potential tax on the capital-gain element in the gifted property.

For example, the net cost to a donor in the 31 % tax bracket of a \$22,000 gift of securities originally purchased for \$2,000 is \$11,180. If the deduction is more than 30% of the person's adjusted gross income, the deduction may be carried forward over five years. The charity benefits immediately.

If you would like to learn more, please contact Elaine Peck at 765-653-4978 or toll free at 866-653-4978. Also, go to www.pcfoundation.org.

The Community Foundation encourages you to always consult your financial advisor and/or attorney when making a planned gift.



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