



GIFT OF APPRECIATED STOCK

Turn stock market gains into community investment.

Everybody wins when you make a gift of appreciated stock to your community foundation. Your gains are put to good use. Your gift of stock is reinvested in your community, and it qualifies for an immediate tax deduction based on the full fair market value.

REWARDING RETURN ON YOUR PORTFOLIO

Giving appreciated stock through a community foundation is popular among a range of givers—individual investors, families, entrepreneurs, and even groups of friends who have formed investment clubs.

By giving stock through your community foundation, you can avoid capital gains taxes that would be due as a result of its sale and establish a charitable fund that benefits the local causes and organizations you care about most. With gifts of appreciated stock, your stock market earnings translate into community impact, so you get a more rewarding return on your portfolio.

You can set up a scholarship; support special programs for at-risk youth, senior citizens, or other people in need; address environmental concerns; or support the arts.

After moving numerous times for professional engineering careers, Kim and Jerry Porter have made their home in Dunn County. They built relationships with involvement in youth hockey, the Humane Society, and bicycling. Kim's leadership with the Foundation, the Women's Giving Circle, and the Free Clinic continue to expand their knowledge, relationships, and giving philosophy.

The Porters started a Donor Advised Fund as part of their long-term charitable strategy. They have made gifts to their fund via donations of appreciated stock. "We want people to know that it is easy to get involved with the Foundation and you have huge flexibility with your giving and legacy choices. And, you don't have to be wealthy."



LEAVE A LEGACY—Appreciated Stock

Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our professional program staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized** service tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

We **multiply the** impact of gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

HOW IT WORKS

- You make a gift of appreciated stock to your community foundation.
- Your gift can be placed into any of our charitable funds. For example, you can use your gift to create a Donor Advised Fund in your name, in the name of your family or business, or in honor of any person or organization you choose. You can then stay involved in recommending uses of the fund.
- Your gift qualifies for a tax deduction based on the full market value of your stock; you avoid the capital gains tax that would otherwise arise from the sale of this stock.
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

OUR MISSION

We are a permanent savings and investment account for Dunn County. From this, we offer strategic grants to respond to local needs. This money grows from contributions from people just like you. We make it possible for anyone to create a legacy.

Our mission is to connect people who care with causes that matter to enrich the quality of life in Dunn County, now and for future generations.

For Good. Forever.