

## **Gifts of Stock for Nonprofit Websites**

Provide an option on a drop-down menu for gifts of stock

The “selection” should take the donor to a page with the following information

Gifts of appreciated securities are a smart and simple way to maximize the effectiveness of your charitable giving. If stocks or mutual funds\* you have held more than a year have increased in value, you may want to consider a gift of these assets, rather than cash. By transferring ownership of your long-term stock to Tulsa CARES, you make a gift to support our mission, avoid the capital gains tax you would pay if the stock were sold, and you may claim a charitable income tax deduction for the current fair market value of the asset.

\*Does not apply to tax-exempt retirement plans (ie., IRAs, 401(k)s, etc.)

### **To make a stock transfer:**

Please call Tulsa CARES (918-834-4194) prior to the free delivery. Provide the following information:

- Number of shares being transferred
- Name of security being transferred (company name and trading symbol)
- CUSIP number

### **To make a gift from your mutual fund:**

Please call Tulsa CARES (918-834-4194) prior to the impending wire. Specifically, Tulsa CARES needs the following information:

- Number of shares being transferred
- Name of mutual fund being transferred (company name and trading symbol)
- CUSIP Number
- Name and telephone number of the individual broker representing your donor