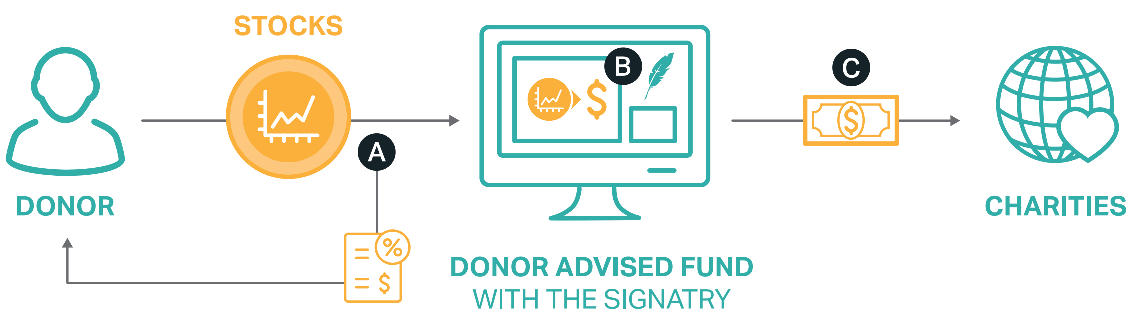
The Signatry
A Global Christian Foundation

Giving Publicly Traded Securities

The traditional giving approach is to sell publicly traded securities such as stocks, mutual funds, or bonds, and donate to charities from the proceeds. However, there is a better way. By giving the publicly traded securities to a donor advised fund (DAF), capital gains taxes can be avoided. This increased tax benefit provides the opportunity for even more to go toward a donor's causes.

How It Works



A Donate stock to your DAF. Receive an income tax deduction and avoid capital gains tax.

B The Signatry liquidates the securities and proceeds are deposited to your DAF.

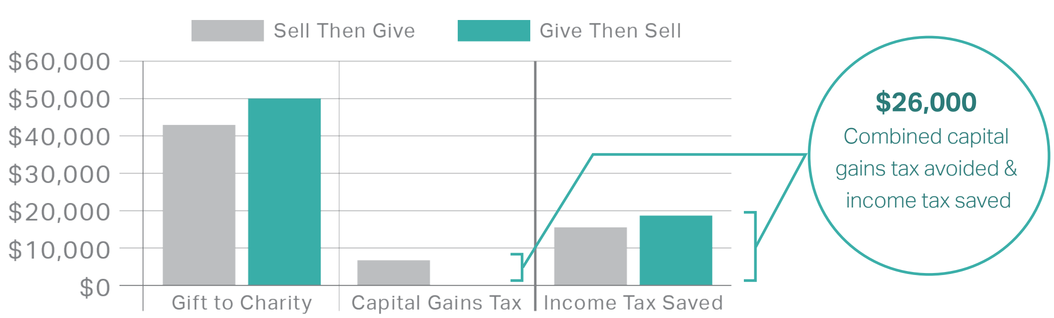
C Recommend grants from your DAF to the causes you care about.

Benefits

- You avoid capital gains tax.
- You have more cash to rebalance your portfolio.
- You receive an income tax deduction for the full amount of the charitable gift.
- Using a DAF with The Signatry, your donations can grow in investments to yield even further return for charitable giving.
- You can keep what you saved in tax, or you can utilize the extra for additional giving.

Practically Speaking

By giving stock to a donor advised fund and then giving from the proceeds, it can maximize your generosity and minimize taxes. Here is how the impact of this compares to the traditional approach of selling and then giving from the proceeds.



This scenario assumes a cost basis of **$20,000**, a fair market value of **$50,000**, ordinary income tax rate of **37%**, and capital gains tax rate of **25%**.

The Signatry is a 501(c)(3) organization and a donor advised fund sponsor. We facilitate the accounts through which people give, and we work to train, inspire, and equip families, ministries, and advisors for radical biblical generosity.

Disclaimer: The Signatry does not provide legal, tax, financial, or other professional advice.
You should consult professional advisors concerning the legal, tax, or financial consequences of your charitable activities.