

Stock and Securities Gifts

Appreciated Securities

Gifts of appreciated shares of marketable securities—stocks, bonds and mutual funds—are popular alternatives to cash gifts. Giving these gifts, you realize certain tax benefits as the donor. Provided you've held the securities for more than 12 months, you can claim an income tax deduction for the full fair market value on donated securities, and generally you are able to avoid capital gains tax on the appreciation. However, you must itemize your tax return to claim any charitable deduction.

The easiest way to make a gift of stock or other negotiable securities is to advise your broker to transfer the shares from your account to *NCR*.

Recognizing and acknowledging donor gifts is extremely important to us. When making a gift of appreciated securities to *NCR*, please advise us when a transaction has been initiated. This helps ensure proper handling and recognition of these of important gifts.

Please contact our Development Office at 1-800-444-8910, ext. 2265 for additional information your broker will need to complete your request.

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