



THE BENEFITS OF GIVING STOCKS & MUTUAL FUNDS

Giving long-term appreciated securities to a donor advised fund at InFaith Community Foundation is an easy and tax efficient way to support your favorite charities. Consider these benefits:

Give stock. When securities are given to InFaith rather than sold by the donor, the donor bypasses capital gains taxes on the appreciated value.

Receive tax benefits. The donor benefits from a larger immediate charitable deduction.

More support to charities. Donor's charities benefit from a larger initial gift that can support multiple charities.

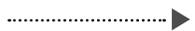
Long-term appreciated securities, whether they are stocks or mutual funds, can provide a tax deduction for up to 30% of an individual's adjusted gross income, and any unused portion of the deduction exceeding this threshold may be carried forward for an additional five tax years. The result is often an even larger charitable gift than may have been expected.

A Look at the Numbers

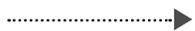
Scenario #1



THE DONORS



DONOR ADVISED FUND



THE OUTCOME

The donor sells securities and gives proceeds to InFaith to support favorite charities through a donor advised fund.

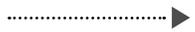
Fair market value of stock: \$50,000
 Long-term capital gains tax paid (\$25,000 unrealized gains x 15% tax rate) = \$3,750

Value of charitable gift after eligible tax deduction = \$46,250

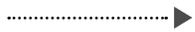
Scenario #2



THE DONORS



DONOR ADVISED FUND



THE OUTCOME

The donor gives securities directly to InFaith to support favorite charities through a donor advised fund.

Fair market value of stock: \$50,000
 Long-term capital gains tax paid = \$0

Value of charitable gift = \$50,000
 \$3,750 more to donor advised fund

For More Information

To learn more about how the value of giving stock and mutual funds to a donor advised fund at InFaith, call 800-365-4172.

Charitable giving can result in significant tax, legal and financial consequences. Because InFaith cannot give legal or tax advice, you are strongly encouraged to consult with your personal legal and tax advisors.

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To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this document is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending to another party any transaction or matter addressed herein.



InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor's charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith now grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit inFaithFound.org.



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Spreading Joy. Changing Lives.

WE OFFER

- Donor advised funds, collaborative funds and organizational endowments
- Breadth of giving options, including cash, stock, real estate, bequests, beneficiary proceeds, life insurance, charitable gift annuities, charitable remainder trusts and qualified charitable distributions
- Flexibility to give to any charity
- Maximum tax benefits based on when and how you give
- Donor-centered services and online access
- Mission-based investment options for charitable assets