



## *A Gift of Appreciated Securities – Buy Low, Give High*

**Gift of Appreciated Securities – A charitable gift of appreciated securities may be the best return on your investment and maximize your tax saving.**

Donating appreciated securities often allows you to make a bigger charitable impact than might otherwise be possible.

What classifies as a security? Generally, securities are any share of stock in a corporation; any note, bond, debenture, or evidence of indebtedness; cryptocurrencies; and treasuries.

### **Benefits**

**Make your gift with appreciated assets instead of cash to maximize your tax savings and the value of your gift.**

- If you donate securities or similar assets that you have owned for more than one year, you are entitled to a charitable income tax deduction based on their current value.
- You also avoid the capital gains tax that you could have paid if you sold the stock and then donated the proceeds.
- Because the value of these assets may have increased significantly over time, your tax savings may be sizable.
- By donating the appreciated stock, you are actually giving 20% percent more than if you sold the stock and then made a cash donation, according to Fidelity Charitable. And the direct cost to you is the amount you paid for the security.

### **How It Works**

For some donors, the donation of appreciated securities is an easy way to make a gift to Meher Mount.

- When you give appreciated securities, Meher Mount will sell the appreciated assets and then direct the funds according to your instructions.
- You can also pledge a *future* (planned) gift of appreciated securities to Meher Mount as specified in your will or estate.
- With either a current or planned gift, the value of the gift for tax purposes is determined by the date the security is received in Meher Mount's brokerage account and is the actual gift date.

## **How to Make a Gift of Securities to Meher Mount**

You can make a current gift of appreciated securities now. You may also designate appreciated securities as a gift from your will or trust.

To donate securities to Meher Mount, you will need to provide the following information to your brokerage firm:

**Legal Name:** Meher Mount Corporation

**Address:** 9902 Sulphur Mountain Road, Ojai, CA 93023-9374

**Telephone:** 805-640-0000

**Federal Tax ID:** 77-0236525

**Status:** 501(c)3 non-profit, charitable organization

You can designate your gift for either the Meher Mount General Fund or the Agnes Baron Endowment for Meher Mount.

Please contact Meher Mount's Robert Turnage at 916-837-3907 or [robert.turnage@sbcglobal.net](mailto:robert.turnage@sbcglobal.net) to assist you in directing your securities to Meher Mount's brokerage firm.

## **Consult Your Personal Advisors**

The information provided above is **not** to be construed as tax, accounting or legal advice and could change as tax laws change. You are advised to consult with your legal advisor, tax advisor, or professional estate planner to determine which options are best suited to your individual situation.

## **Questions or Need More Information?**

Conversations with Meher Mount's planned giving team are always confidential and never imply an obligation. Robert Turnage, Treasurer for Meher Mount, will respond and provide the information you requested.

- Call: Robert Turnage, Treasurer: 916-837-3907
- Email: Robert Turnage, Treasurer: [robert.turnage@sbcglobal.net](mailto:robert.turnage@sbcglobal.net)

### **Share Your Plans to Ensure Your Legacy**

If you have already included Meher Mount in your plans (or intend to), please let us know. Meher Mount can provide you and your advisor(s) with any needed information. We will make sure your gift is used exactly as you wish. And we would like to personally acknowledge your thoughtfulness and generosity.