

# give stock, save taxes, give more

Maximize Kingdom impact by giving appreciated securities instead of writing checks

In some cases giving a stock gift may make more sense for you as a donor. If you are currently making cash donations, but also have appreciated stocks or mutual funds in a taxable investment portfolio, you likely have a significant opportunity to pay less tax, give more, improve your personal cash flow and simplify your giving.

## TRADITIONAL GIVING USING CHECKS >>

1. Start with \$10,000 in cash
2. Write checks to ministries for \$10,000
3. Receive a \$10,000 charitable deduction
4. Keep track of every tax receipt manually
5. Continue to pay capital gains tax in your portfolio (now or later)

## MORE GIVING USING STOCK >>

1. Donate \$10,000 of stock
2. Receive a \$10,000 charitable deduction
3. Shares are sold by Adventure Church tax-free
4. Re-fund your portfolio using \$10,000 cash (reset basis!)
5. Use tax savings to give more!



## IMPACT OF A NEW APPROACH >>

### Multiply Your Impact

- Less tax - You eliminate capital gains tax on the donated stock (\$1,000 saved assuming \$5k cost basis with 20% tax)
- More giving - You increase your giving capacity by eliminating current or future tax exposure
- Reset your cost basis - Still like the stock? Use your cash to repurchase the same stock or mutual fund
- Tax-free rebalancing - Your investment advisor can rebalance your portfolio with no tax consequences
- Improved personal cash flow - Using tax savings to give more increases your charitable deduction
- Tax-free growth - Gifts invested inside your Giving Fund can grow tax-free

To discuss these options or for answers to any of your questions concerning this giving strategy, please contact Jackie Serrano at [jackie@adventurechurch.tv](mailto:jackie@adventurechurch.tv)