

Learn more about...



Giving with Stocks

Donating stock to charity allows you to benefit a cause you care about, all the while avoiding capital gains tax (or future estate tax) on appreciated assets, providing charitable deductions, and even, in some plans, producing income for life.

Different Ways of Giving with Stocks

1. Current Stock Transfer

By transferring your stock this year, you can enjoy the benefits of tax savings on this year's tax return. Like each of the following plans, your gift will bypass capital gains tax that would otherwise be due on the sale of your appreciated stock. This option has the added bonus of allowing you to see your gift at work.

2. Stock Bequest

In your will or trust you may include instructions for transferring your stock to charity. Your estate will benefit from a charitable deduction that will reduce the impact of taxes on your estate and your heirs.

3. Gift Annuity for Stock

You may transfer your stock to fund a charitable gift annuity that will pay you fixed income for as long as you live. You will receive an income tax deduction for your gift in the year you set up the annuity. At the end of your life, the remaining value goes to charity.

4. Unitrust and Sale of Stock

By giving your stock to fund a unitrust, the trust will sell your stock tax-free and then invest the proceeds to provide you with income for life. You will receive a charitable income tax deduction in the year the trust is established. At the end of your life, charity will benefit from the remaining trust value.

The Benefits

- *Enjoy seeing your gift at work in the near term*
- *Bypass capital gains tax*
- *Receive a charitable deduction on this year's taxes*
- *Leave a gift in your will*
- *Receive a charitable deduction on your future estate taxes*
- *Receive income for life*
- *The remainder of the annuity is a gift to charity*
- *Reduce capital gains tax*
- *Receive a charitable deduction on this year's taxes*
- *Receive income for life*
- *The remainder of the unitrust is a gift to charity*
- *Bypass capital gains tax*
- *Receive a charitable deduction on this year's taxes*

If you are interested in donating stock to The Ohio University Foundation, or if you have questions about which charitable plan could best work for you and your loved ones, please contact Kelli Bell at (740) 597-1819 or bellk@ohio.edu.