



Gifts of Appreciated Stock

The volatility in 2020 of the Dow Jones industrial average, including its broad base recovery, presents investors with a unique opportunity to make a transformational gift to United Way Bay Area. Some investors in the Bay Area may find themselves with portfolio concentrated in a low-cost-basis stock - possibly acquired as retirement compensation, in a merger, or through entrepreneurial success. This may be especially true for those with significant holdings in the tech sector, which drove much of the recovery. Through a gift of appreciated stock, you receive a charitable income tax deduction for the full fair market value of the securities, while also helping you avoid capital gains taxes on appreciated stock. This allows you to maximize your gift.

Steps To Give

- 1** Please contact Channa Sweet at csweet@uwba.org or 415-808-4408 for the Gift of Stock form which contains the information your broker will need.
- 2** Notify United Way Bay Area upon initiating the transfer of shares to ensure we credit the gift to you and issue a tax receipt for your donation.
- 3** Please contact Channa Sweet at csweet@uwba.org for 415-808-4408 with questions about stock giving, additional paperwork, or to learn more about the impact of your donation.

Helpful Tips

The date of the stock gift is the day the right of ownership of the stock is effectively transferred to United Way.

The value for tax purposes is the mean between the high and low quoted selling prices on that day.

Expedite your acknowledgment process by instructing your broker to provide your name so we can properly thank you for your donation!

