

The benefits of donating stock to LREF

1. You avoid capital gains taxes. Most donors can also claim an income tax deduction for the stock's full market value and state and local income tax deductions may be available in some areas.
2. More impact. When you donate appreciated securities your gift can be up to 20% larger because you avoid the taxes you'd incur from selling and donating the cash. This means more money going to the LREF work you support.

How to donate your securities to LREF

1. Choose the securities you'd like to donate. You'll need your brokerage name, account number and number of shares you'd like to include in the gift. We recommend a call to your financial advisor who can help you complete this process.
2. Request a DTC Securities Stock Transfer Form from LREF. Complete the form and send to your advisor to initiate the transfer of securities to LREF.
3. Your gift of stock is transferred to LREF. Once the transfer is complete, you'll receive a tax acknowledgement for the market value of your gift.