



Gifts of Stock

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Groups audience: SVS Foundation

Gifts of Appreciated Stock

Giving stock is one of the most tax-savvy ways to maximize your philanthropic impact.

When donating stock, one can avoid paying two types of taxes: capital gains and state income taxes. Additionally, donors can claim a charitable deduction for the fair market value, or current price of the stock, at time of the donation.

How do you donate stock to SVS Foundation?



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0. Contact the SVSFoundation@vascularsociety.org or at 312-334-2352 to find out the stock donation process, provide your contact info and your intent to give, and to receive transfer information.

0. Contact your brokerage company for their stock donation process forms. The forms and documentation required can vary, so it is important to get the specifics.

0. With the proper information, the brokerage company will get its side of the process completed. Additional paperwork may need to be completed to authorize the stock donation and finalize the transfer of the shares.

0. Upon successful transfer of the donated stock, SVS Foundation will send you an official acknowledgement of your contribution for tax purposes.

Three common types of stock that can be donated are:

- Publicly traded stocks
- Mutual funds
- Privately held stocks