Portland Trails
Benefits of Stock Gifts

Give a gift of stock! Did you know that giving appreciated securities is one of the most tax-efficient ways to support Portland Trails?

Why donors choose stock:

- **Avoid capital gains tax.** When you give shares held longer than one year directly to us, you generally don't pay capital gains tax on the appreciation.
- **Deduct the full value.** If you itemize, you may be able to deduct the fair market value of the shares, not just what you paid for them.
- **Give more.** Because you're not losing a portion of the gain to taxes, more of your gift goes to our work.
- **Keep your cash.** Stock lets you give generously without touching your savings or checking account.
- **Rebalance your portfolio.** A gift of stock can be a good way to reduce a concentrated position.

How it works:

1. **Contact us.** Let us know you're planning a gift of stock so we can send you our brokerage transfer instructions. Contact Executive Director, Jon Kachmar, at jon@trails.org or (207) 775-2411.
2. **Instruct your broker.** Ask your broker or financial institution to transfer the shares electronically to our account. We'll provide our tax ID number, the account name, account number, and DTC number.
3. **Tell us about the gift.** Send us your name, the stock symbol, the number of shares, and the transfer date so we can match and acknowledge it.
4. **We sell the shares.** Portland Trails typically sells donated securities promptly, and the proceeds support our mission.
5. **Get your receipt.** We'll send an acknowledgment for your tax records. The IRS values the gift as the average of the stock's high and low price on the day the shares reach our account.

Portland Trails is a 501(c)(3) nonprofit, EIN 01 046 3028. We're unable to provide tax advice, so please consult your financial or tax advisor about your situation.

38 Diamond Street Portland, Maine 04101
207-775-2411 • info@trails.org • www.trails.org