

# Gift of Appreciated Stock

Turning stock market gains into community investment

Everybody wins when you make a gift of appreciated stock to the Greater Milwaukee Foundation. Your gift of stock is reinvested in your community, while qualifying for an immediate tax deduction based on the full fair market value.

## HOW IT WORKS

- You make a gift of appreciated stock to the Foundation.
- Your gift can be used to establish any of our charitable funds. For example, you can use your gift to create a donor advised fund in your name, in the name of your family or business, or in honor of any person or organization you choose. You can then stay involved in recommending grants from the fund.
- Your gift qualifies for a tax deduction based on the full market value of your stock; you avoid the capital gains tax that would otherwise arise from the sale of the stock.
- We handle all the administrative details, including issuing grants to nonprofits in the name of the fund you establish. If you prefer, grants can be made anonymously.
- Your gift—and all future earnings from your gift—will be a permanent source of community capital, helping to do good work forever.

## Ten Reasons People Choose to Give through the Greater Milwaukee Foundation

**One** We are a *local organization* with deep roots in the community and beyond.

**Two** Our community investment staff has *broad expertise* regarding community issues and needs.

**Three** We provide highly *personalized services* tailored to each individual's charitable and financial interests.

**Four** Our funds help people *invest in the causes* they care about most.

**Five** We accept a wide *variety of assets*, and can facilitate even the most complex forms of giving.

**Six** We partner with *professional advisers* to create highly effective approaches to charitable giving.

**Seven** We offer *maximum tax advantage* for most gifts under federal law.

**Eight** We *multiply the impact* of gift dollars by pooling them with other gifts and grants.

**Nine** We build *endowment funds* that benefit the community forever and help create personal legacies.

**Ten** We are a *community leader*, convening agencies and coordinating resources to create positive change.



### DONOR STORY: GENERATING A RETURN FOR YOUR COMMUNITY\*

Joanne and Gerald Miller live comfortably, but didn't think they had enough discretionary income to make an impact in the community through charitable giving. Their financial adviser helped them identify a way they could make a meaningful gift through a donor advised fund at the Greater Milwaukee Foundation.

"Making a gift of appreciated stock provided the means for giving to our community," says Joanne and Gerald. Last year, the Miller Fund supported a local family outreach program, a homeless shelter, and a local theater group. "Some of our charities are too small to accept direct stock gifts," says Joanne. "Giving through the Foundation eliminates that barrier." The Millers receive a tax deduction on the full market value of their appreciated stock, while avoiding the capital gains tax that would otherwise arise from sale of this stock. Gerald says, "It's a simple, satisfying way to give."

### MORE BENEFITS

Giving appreciated stock through the Foundation is popular among a range of givers such as individual investors, families, entrepreneurs, and even groups of friends who have formed investment clubs. By giving stock through the Foundation, you can avoid capital gains taxes that would be due as a result of its sale and establish a charitable fund that benefits the local causes and organizations you care about most. With gifts of appreciated stock, your stock market earnings translate into community impact, so you get a more rewarding return on your portfolio. You can set up a scholarship; support special programs for at risk youth, senior citizens, or other groups in need; address environmental concerns; or support the arts.

*\* This story represents a composite illustration drawn from actual donor stories of many of the people who give through the Foundation.*



Confirmed in compliance with National Standards  
for U.S. Community Foundations

### The Greater Milwaukee Foundation

**provides** a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals. We welcome the opportunity to work with you and your adviser to fulfill your unique charitable objectives. For more information and ways to integrate charitable giving into your financial planning, contact the Philanthropic Services Department at 414-272-5805.