

WE CAN HELP

I have reviewed this brochure and:

- I would like to talk to someone about gifts of stock.
- I would like to receive information about other charitable tax-planning options.
- I would like to sign up for your free e-newsletter.

The best way to contact me is:

- Email Mail Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(All inquiries are treated with complete confidentiality.)

Please complete this form and either send to **lfink@akroncf.org** or mail to:

Akron Community Foundation
Attn: Laura Fink
345 W. Cedar St.
Akron, OH 44307

WHY AKRON COMMUNITY FOUNDATION


At Akron Community Foundation, our business is helping you give efficiently, effectively and meaningfully to your favorite causes and charities. You choose the cause or nonprofit. We make sure your charitable gifts reach your targets, whatever they are. By establishing a fund at Akron Community Foundation, you and your family can support activities right here in greater Akron, or at any 501(c)(3) nonprofit in the nation.

With six structured charitable fund options — from popular donor-advised funds to scholarship funds — you can give in the way that makes sense for your charitable dreams. Do you want to give to specific organizations? You can do that. Do you want your family to be involved in the grant-making decisions? We can make that possible, too.

Let us help you establish your charitable legacy in a way that makes the most sense for you and your loved ones. Call your professional advisor today to discuss your options. Or, you can contact us directly at 330-376-8522 or www.akroncf.org.



GIFTS OF CHARITABLE STOCK

 The many ways of making a difference with stock.

 AKRON
COMMUNITY
FOUNDATION
Enriching lives since 1955



BENEFITS OF CHARITABLE GIVING WITH STOCK

If you are like most individuals, the value of your stock and other investments has grown over the years. Perhaps you are entering your retirement years and wondering how you can turn your highly appreciated asset into extra income.

You may also be concerned about the mounting capital gains taxes due. If you sell your stock in today's market, you will forfeit a portion of the proceeds to taxes, which means less cash for you. In short, you need a way to sell your stock and avoid capital gains.

If you identify with any of these situations, the solution is a charitable stock plan. A variety of charitable plans can help you achieve your goals for tax savings and even provide income. The purpose of this brochure is to explain the benefits of a charitable stock plan and how it can work for you.



OUTRIGHT GIFTS OF STOCK

Two other charitable stock plans may help achieve your goals if you are looking for ways to avoid income or estate tax.

CURRENT STOCK GIFT

By transferring your stock to us today, you can enjoy the benefits of tax savings on this year's return. In addition to your charitable deduction, you will avoid paying capital gains tax that would otherwise be due on the sale of your appreciated investment.

STOCK BEQUEST

If you are still enjoying the benefits of holding your appreciated stock but are looking for a way to avoid estate tax in the future, a stock bequest is a good choice. By including instructions for transferring your stock to us in your will or trust, your estate will benefit from a charitable deduction that will lessen the impact of taxes on your estate and your heirs.



GIFTS OF STOCK FOR LIFE INCOME

The two charitable stock plans discussed below may provide you with tax savings and income for retirement.

GIFT ANNUITY FROM STOCK

You may transfer your stock to fund a charitable gift annuity that will partially bypass capital gains tax and pay you fixed income for life. The rates can be quite high depending on your age, and a part of your income stream may even be tax free! You will receive an income tax deduction for your gift in the year you set up the annuity. At the end of your life, you have the satisfaction of knowing the remaining value will be used to establish or add to your charitable fund as you've specified.

UNITRUST AND SALE OF STOCK

By giving your stock to fund a unitrust, you can avoid capital gains tax because the trust will sell your stock tax free and then invest the proceeds to provide you with income for life. You will receive a charitable income tax deduction in the year the trust is established and benefit from tax savings that could be spread out over a number of years. The future remaining value will be used to establish or add to your charitable fund.