

PUT STOCK IN



Donating appreciated securities to Wasatch Adaptive Sports is a smart and simple way to promote adaptive recreation

How It Works

If you have significant unrealized gains in your investment portfolio, consider gifting a portion of your appreciated securities (including publicly traded stocks, bonds, and mutual fund shares) to WAS in support of the growing number of children, adults, and veterans with adaptive needs seeking accessible and affordable recreation.

1. You transfer appreciated securities to WAS.
2. WAS sells the securities and uses the proceeds for mission critical work.

How You Benefit

- You receive credit and an immediate tax deduction for the fair market value of your donation.
- You avoid capital gains tax.

	Donate \$5,000 in Cash	Donate \$5,000 in Securities
Charitable Deduction	\$5,000	\$5,000
State & Federal Capital Gains Tax Saved* (at 50% gain or \$2,500)	\$0	\$719
State & Federal Income Tax Saved**	\$1,998	\$1,998
Net Cost of Gift	\$3,002	\$2,283

This is a hypothetical example of possible tax savings.

**Capital gains tax rates used: 20% (Federal) + 4.95% (State) + 3.8% (NIIT) = 28.75%*

***Income tax rates used: 35% (Federal) + 4.95% (State) = 39.95%*

How To Transfer Stock

1. Contact WAS's Development Director Abbie Rice at 801.933.2188 or abbie@wasatchadaptiveportsorg to let WAS know your gift is coming.
2. Abbie will provide stock transfer instructions to share with your broker.

Thank you for your interest in supporting Wasatch Adaptive Sports!

This information is not intended as tax or legal advice, and it may not be used for the purpose of avoiding any federal tax penalties or liabilities. Gifted securities must have been held for more than 1 year to be fully deductible. Deductions are subject to IRS limits. Please consult legal or tax professionals for specific information regarding your individual situation.