Appreciated Investments



Gifts of appreciated property, such as stocks and bonds that you have held for more than one year, can provide greater tax benefits than giving cash. Not only is the market value of the securities deductible (subject to applicable limitations), but you also avoid paying the capital gains tax on the appreciation. Our staff can work with you and your adviser to facilitate a gift that will be the most advantageous for you. Please note that, as a general rule, you should not give Goshen College depreciated securities. It is more advantageous to you to sell such securities, take a loss on your income tax return and donate the proceeds.

The most important thing to remember is to donate the stock itself, not the proceeds from the sale of the stock. `

IF YOUR STOCK IS HELD IN A BROKERAGE ACCOUNT

Simply notify your broker of your intent to give stock to Goshen College and ask him or her to contact the development office at once for instructions on how to accomplish the

Giving shares of a mutual fund

Gifts of mutual fund shares may also be given to the college. Most mutual fund companies have a form you must complete to affect the transfer, so you will need to contact your company and request directions on how to make such a gift. It is wise to inform the development office of your plans so staff members can assist you in this process. Transferring mutual funds may take between two and three weeks to accomplish.

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