



Giving a Gift of Stock to the National Wildlife Refuge Association!

Thank you for considering a stock gift! Transferring your stock is one of the most tax-savvy ways to contribute to the National Wildlife Refuge Association. If you transfer stocks directly to a certified nonprofit, you won't be responsible for capital gains taxes, and you can deduct the full amount of your stock as a charitable donation!

Want to Give Today?

If you would like to work with your financial institution to donate stocks, here are the transfer instructions they will need:

1. **Contact Courtney Phelan** at (202) 577-3200 or at cphelan@refugeassociation.org so can look out for your charitable gift!
2. **Name of Broker: Charles Schwab & Co.**
Name of Account: National Wildlife Refuge Association
Brokerage Address: 1650 Tysons Blvd., Suite 150, Tysons Corner, VA 22102
Brokerage Account Number: 1805-9501
National Wildlife Refuge Association Tax ID: 23-7447365
DTC Number: 0164

Please include your name on your stock transfer so we can thank you for your gift!

Stock Donation FAQ

What are the benefits of donating appreciated assets?

By donating stock rather than selling it, you will avoid paying a capital gains tax. Capital gains tax is a tax on the profit made from the sale of a non-inventory asset like stock. These can be as high as a federal tax rate of 20% for long-term holdings (or stocks being held for more than one year), and for some states (like California, which has a 13% tax rate) an additional tax rate on top of the federal rate. If you donate a long-term holding and itemize deductions, you can also take a charitable deduction for the entire donation.

Can I have an example of how transferring stocks can save me money?

When you donate stocks, you are essentially saving 30% on taxes by excluding gains from your returns. Let's say you want to give a gift of \$1,000 to our organization this year. If you want to sell the stock before donating it, you would have to sell about

\$1,400, and pay the \$400 in taxes on the sale of the stock before donating the remaining \$1,000. But if you transfer the stock directly to the National Wildlife Refuge Association, you only need to transfer the \$1,000 worth of stocks, and you won't have to pay tax.

The stock market is trending upwards, but it's been a tumultuous year. Is it still a good time to donate stocks?

Yes, and now might be the best time to donate stocks. The stock market has been trending upwards, reaching highs this year. But the market is volatile, and trends can change at any moment. Donating stocks today ensures you can take advantage of these highs, and give the powerful gift you intend.

I'm convinced that donating stock is a great way to give, but I don't want to lose my holdings.
After donating stock, you are eligible to buy the same stock again within the day. This allows you to make a powerful, tax-savvy gift while maintaining your portfolio, no matter the market.

For my gift to be eligible for my 2022 tax return, when should I give?

We recommend following the market to ensure that you can give the best gift based on the assets you hold. However, for your gift to be eligible for the 2022 tax year, please transfer your stocks by December 31, 2022.

Questions?

If you have any other questions, please contact Courtney Phelan, CFRE at 202-577-3200 or cphelan@refugeassociation.org.

Compliments to FreeWill for providing this great information for our organization.