Donate Appreciated Securities

Evaluate the best options and get the most tax efficiency

7 Tax Strategies to consider:

1. Evaluate instead of giving gifts of cash the possibility of giving a gift of an asset such as stock, mutual fund, real estate, royalty, business interest or home to your favorite charity.
2. Evaluate various methods to avoid paying a capital gains tax; instead of paying a tax you could possibly get a tax deduction.
3. Evaluate retirement accounts and determine the best exit strategy to reduce tax while paying income and passing the maximum to heir and evaluate the Charitable IRA Rollover for people over 70 - 1/2.
4. Evaluate methods to reduce current income tax by possibly accelerating future charitable gifts into the current year and get the present value of those future gifts as a tax deduction for this year.
5. Evaluate converting low interest earning assets with nominal yields for a guaranteed lifetime income like a pension and get a partial tax deduction.
6. Evaluate an estate plan which could possibly leave 100% of your assets to your heirs and another 100% to Charity by using tax efficient charitable Leverage.
7. Evaluate ways to get a major charitable income tax deduction now on your home while you live in the house.

Tax Strategies which may help to:

- Avoid Excess Medicare Tax
- Avoid Net Investment Tax
- Avoid Capital Gains Tax
- Avoid Compounding Tax
- Avoid Estate Tax
- Avoid Income in Respect of a Decedent (IRD)
- Maximize Charitable Giving Tax Deductions
- Reduce Income Tax

	Donate Appreciated Securities Outright	Donate $10,000 Cash	Sell Securities & Donate Cash
Charitable deduction	$10,000	$10,000	$10,000
Ordinary income tax savings (assumes 35% rate)	$3,500	$3,500	$3,500
Capital gains tax paid (assumes 15% tax rate on $8,000 gain)	$1,200 saved	N/A	$1,200 paid
Net tax savings	$4,700	$3,500	$2,300

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