

Gifts of Stocks and Bonds

Donating appreciated securities, including stocks or bonds is an easy and tax-effective way for you to leave a legacy and make a gift to AMGA Foundation.

Benefits of gifts of stocks and bonds

- Avoid paying capital gains tax on the sale of appreciated stock
- Receive a charitable income tax deduction
- The “cost” of your gift is often less than the deduction you gain by making it

When you donate stocks, bonds or mutual funds, you receive a tax deduction for the full, current fair market value of the property donated—if you have held the property for more than one year—on the date of transfer. You pay no capital gains tax on the transfer when the stock is sold. And because, in most cases, the stocks or bonds or mutual fund shares can be easily transferred to AMGA Foundation, you also can avoid the commission expense that would normally be due for the sale.

How to make a gift of stocks and bonds

By electronic transfer: For instructions on how you can transfer stock or bonds from your brokerage or investment account to AMGA Foundation please download the [gifts of stock form](#).

By certified mail: If you hold securities in certificate form, you will need to mail two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail.

Send to:

Sherry Greenwood
AMGA Foundation
One Prince Street
Alexandria, VA 22314-3318

Please include AMGA Foundation’s Tax ID #54-6059304 in all legal documents and consult your legal or financial advisor before making a gift.

More on gifts of stocks and bonds

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

Contact us

If you have any questions about gifts of stocks and bonds, please email [Sherry Greenwood](#). She is happy to assist you and answer any questions that you have.

Thank you

Thank you for considering AMGA Foundation as the recipient of your charitable gift.