



Giving a Gift of Stock to The Trumpeter Swan Society

Thank you for considering a stock gift! Transferring your stock is one of the most tax-savvy ways to contribute to the Trumpeter Swan Society. 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 Margaret Smith** at (715) 441-1994 or at ttss@trumpeterswansociety.org so we can look out for your charitable gift!

2. Name of Broker: Vanguard

Name of Account: The Trumpeter Swan Society

Brokerage Account Number: 65204443

The Trumpeter Swan Society Tax ID: 23-7220654

DTC Number: 0062

Please include your name on your stock transfer so we can thank you for your gift or fill out the Gift of Stock Information Form (page 3)

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 Trumpeter Swan Society, 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 2024 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 2024 tax year, please transfer your stocks by December 31, 2024.

Questions?

If you have any other questions, please contact Margaret Smith, at 715-441-1994 or ttss@trumpeterswansociety.org

THE TRUMPETER SWAN SOCIETY

12615 Rockford Road, Plymouth, Minnesota 55441

715-441-1994 • ttss@trumpeterswansociety.org

www.trumpeterswansociety.org

Working to assure the vitality and welfare of wild Trumpeter Swans since 1968

Gift of Stock Information Form for Electronic Transfers

If you have any questions, please contact Margaret Smith(715) 441-1994 or

ttss@trumpeterswansociety.org

For outright gifts only- not for planned gifts

1. Please instruct your financial advisor to transfer DTC-eligible shares to the following:
Bank: Vanguard
DTC#: 0062
Account number: 65204443
2. Notify The Trumpeter Swan Society that the transfer has been initiated. **Your notification is the only way we can identify your gift when it is received.** You can do this by:
 - a) Mailing this form to:
The Trumpeter Swan Society
ATTN: Margaret Smith
12615 Rockford Rd.
Plymouth, MN 55441-1248
 - b) Contacting Margaret Smith at (715) 441-1994 or
 - c) Returning this form to: ttss@trumpeterswansociety.org

3. Upon confirming transfer, The Trumpeter Swan Society will provide you with a formal tax receipt of your contribution.

Thank you for your support!

Donor(s) name _____

Address: _____

Phone: _____

Name of stock: _____

Number of shares and approx. value _____

Delivering bank or brokerage and DTC: _____

Broker name and phone number: _____

Please use this gift in the following way: ☐ Where it is needed most

☐ For a specific TTSS program _____

This gift is given:

☐ In Honor of ☐ In Memory of ☐ I/we wish to remain anonymous