Donate a gift of stock

WHAT CAN BE DONATED?

Stocks, mutual funds, bonds, or any other publicly traded securities can be transferred as gifts.

ADVANTAGES

- The market value of a gift of stock and securities is tax-deductible, just like any other charitable contribution.
- Giving stock or securities has an additional tax advantage over a cash gift: you avoid capital gains tax on the appreciation of the asset.
- A gift of stock or securities could increase the value of your gift to Dana-Farber and the Jimmy Fund at a decreased cost to you (see example on back).

HOW TO MAKE A GIFT OF STOCK

To arrange a stock transfer, contact Ellen Smith at 617-632-5501 or EllenD_Smith@dfci.harvard.edu. Visit Dana-Farber.org/Stock for more information.

ARE YOU A FINANCIAL ADVISOR?

If your clients would like to make a gift of stock, please note Dana-Farber’s tax ID number is 04-2263040. Please visit Dana-Farber.org/FinancialAdvisors for more information.
Help conquer cancer with a tax-deductible gift of stock to Dana-Farber and the Jimmy Fund

Compare the following three ways you could give using a $10,000 gift as an example:

<table>
<thead>
<tr>
<th></th>
<th>Give a Cash Gift to Dana-Farber &amp; the Jimmy Fund</th>
<th>Sell Appreciated Stock &amp; Give Proceeds to Dana-Farber &amp; the Jimmy Fund</th>
<th>Transfer a Gift of Appreciated Stock to Dana-Farber &amp; the Jimmy Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fair Market Value (FMV) of Gift</strong></td>
<td>$10,000</td>
<td>$10,000*</td>
<td>$10,000*</td>
</tr>
<tr>
<td><strong>Long-Term Capital Gains Tax</strong></td>
<td>N/A</td>
<td>($600) (Due to the IRS Tax on Appreciated Stock)</td>
<td>$600 (Capital Gains Tax Savings)</td>
</tr>
<tr>
<td>($4,000 x 15%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Income Tax Savings</strong></td>
<td>$2,400</td>
<td>$2,400</td>
<td>$2,400</td>
</tr>
<tr>
<td>($10,000 x 24%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Tax Savings</strong></td>
<td>$2,400</td>
<td>$1,800</td>
<td>$3,000</td>
</tr>
<tr>
<td>(Capital Gains Tax Savings + Income Tax Savings)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Net Cost of a $10,000 Gift</strong></td>
<td>$7,600</td>
<td>$8,200</td>
<td>$7,000</td>
</tr>
<tr>
<td>(FMV of Gift - Total Tax Savings)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*For which you paid $6,000 and have a $4,000 capital gain
** This example uses a 24% tax bracket

Always consult with your tax advisor for specific tax information when giving securities, as certain limitations to deductions may apply.

OTHER WAYS TO USE STOCK AND SECURITIES TO SUPPORT DANA-FARBER AND THE JIMMY FUND

**Q:** Can I name Dana-Farber as the beneficiary of my investment account?

**A:** Yes, you can name your family members as successors of your stock gift to continue your legacy of giving, or designate Dana-Farber as a full or partial charitable beneficiary. An attorney isn’t necessary to make this gift; simply complete the beneficiary designation form with Dana-Farber’s tax ID (04-2263040.) Let us know if you have named Dana-Farber as a beneficiary – we would be delighted to welcome you as a member of the Dana-Farber Society in recognition of your future gift!

**Q:** How else can I use stock or securities to show my support?

**A:** You can fund a life income gift (such as a charitable gift annuity or charitable remainder trust) using your appreciated assets and reduce your capital gains burden. To learn more, please visit Dana-Farber.org/CGA.

**Q:** Can I donate private stock?

**A:** Yes, please contact us to explore your personalized giving strategy.

For more information, please visit Dana-Farber.org/Stock or contact Dana-Farber’s Philanthropy Office at 617-632-6099. You can also visit Dana-Farber.org/TaxEfficientGifts to learn more ways to give.

ABOUT DANA-FARBER AND THE JIMMY FUND

Dana-Farber Cancer Institute has been the top ranked cancer hospital in New England by U.S. News and World Report for 19 consecutive years, and is ranked in the top 5 nationally for both adult and pediatric cancer programs.

The Jimmy Fund, established in Boston in 1948, is comprised of community-based fundraising events and other programs that, solely and directly, benefit Dana-Farber Cancer Institute’s lifesaving mission to provide compassionate patient care and groundbreaking cancer research for children and adults.