

GIFTS OF APPRECIATED STOCKS, BONDS, AND MUTUAL FUNDS

If you intend to make a gift to support The Greater Hudson Valley Council, it may be more beneficial for you to use appreciated stock, bonds, or mutual funds rather than cash because of potential tax savings.

BENEFITS:

- You receive a charitable income tax deduction equal to the current fair market value of the securities on the date of the gift, provided you've held them for more than one year.
- If you sell appreciated securities, you'll likely pay capital gains tax on the increase in current fair market value over the original cost, which could cause you to lose a portion of the proceeds. By gifting those same securities to The Greater Hudson Valley Council, you'll avoid paying capital gains tax, and The Council will be able to liquidate those securities and receive 100% of the proceeds from the sale.
- The gift is made by simply instructing your broker to wire-transfer the securities directly from your account to The Greater Hudson Valley Council.
- Stock gifts are excellent ways to make current gifts or satisfy multi-year pledges.

To make a gift of securities to the Greater Hudson Valley Council please provide your broker with the following information to facilitate an Electronic Transfer (Via DTC) and then email us so we know who to credit and thank for the Gift (GHV.Development@scouting.org):

Address of the Council's Preferred Brokerage Firm:

Charles Schwab & Co. Inc.

3000 Schwab Way
West Lake, TX 76262

DTC #: 0164

Account #: 4700-6603

For Benefit of: Greater Hudson Valley Council

Please contact the Development Department, at (845-566-7300) or GHV.Development@scouting.org if you have questions or would like more information, or visit ghvbsa.org/ways-to-support-scouting.

