



### **Gifts of Stock to The Village of St. Edward**

Before making a gift to The Village of St. Edward, you may want to consider the potential benefits of donating appreciated stock from your portfolio.

In the past years, many stock values have increased significantly. As a result, your portfolio may hold greatly appreciated securities which carry with them significant unrealized gains that may be subject to capital gains taxes if sold.

The strategic gifting of appreciated securities can allow you to make a generous gift to The Village of St. Edward while also achieving two tax benefits: avoiding capital gains taxes and receiving a charitable deduction on your federal income tax returns.

For specific tax implications, please speak to your personal financial advisor. Stock transfers require both “sender” and “receiver” to know when the transfer will occur. Please note that security transfers are not completed until the next business day. This may be particularly important if you are making gift before December 31.

For more information or to notify The Village of St. Edward of your intentions, feel welcome to contact Vondea Sheaffer, VP of Development (234) 466-0556 (Office) (330) 697-4036 (Cell) or [vondea.sheaffer@vsecommunities.org](mailto:vondea.sheaffer@vsecommunities.org).

The Village of St. Edward Foundation: Tax ID #34-1969623

Transfer details:

Raymond James & Associates

DTC: 0725

Name of: The Village of St Edward Foundation

Account number: 105VP649

Contact: Michelle Weaver at Wells Trecaso Financial Group

(330) 752-8825 or [michelle@wellstrecaso.com](mailto:michelle@wellstrecaso.com)