

GIFTS OF APPRECIATED STOCKS, BONDS, AND MUTUAL FUNDS

If you intend to make a gift to support The Susquehanna 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 Susquehanna 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 Susquehanna Council.
- Stock gifts are excellent ways to make current gifts or satisfy multi-year pledges.

To make a gift of securities to the Susquehanna Council please provide your broker with the following information to facilitate an Electronic Transfer (Via DTC):

Address of the Council's Preferred Brokerage Firm:

Central Penn Bank & Trust
135 Queen Street
Northumberland, PA 17857

DTC #:

Account #:

For Benefit of: Susquehanna Council

Please contact Dennis Dugan, Scout Executive at (570) 326-5121 ext. 5 or dennis.dugan@scouting.org if you have questions or would like more information, or visit susquehannascouting.org/ways-to-support-scouting

