
HOW TO DONATE APPRECIATED SECURITIES / STOCK

Here is a quick guide to ensure the successful transfer of your publicly traded securities.

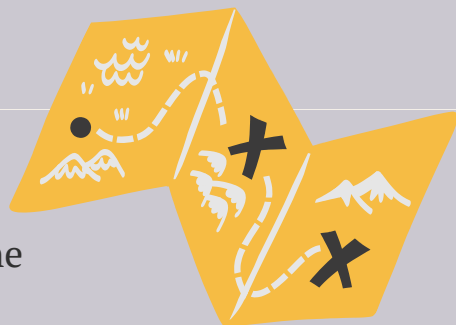
HOW DOES IT WORK

It's simple and easy. When you donate stock to Haven Hills, you'll generally take a tax deduction for the full fair market value, subject to AGI limits. You can consult with your tax or legal advisor, if you need one, we are happy to help connect you with a professional financial advisor.



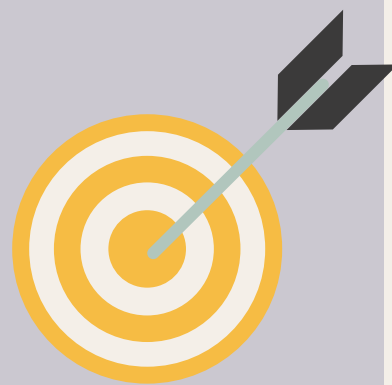
BENEFITS OF DONATING PUBLICLY TRADED SECURITIES

Publicly traded securities held for more than one year—such as stocks, bonds, exchange-traded funds (ETFs), and mutual funds—are the non-cash assets most frequently donated to charities. Why is this? It's probably because these assets are widely owned by donors and easily transferred to charities.



IS THE STOCK IN A BROKERAGE ACCOUNT?

If the stock is held in a brokerage account, and the stock is simply being transferred, please contact our Development Department at 818-887-7481 extension 121 or email aportz@havenhills.org



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