

Turning stock market gains into community investment

Gift of Appreciated Stock



Everybody wins when you make a gift of appreciated stock to the Story County Community Foundation. Your gains are put to good use. Your gift of stock is reinvested in your community, and it qualifies for an immediate tax deduction based on the full fair market value on the day of receipt.

How it works

- You make a gift of appreciated stock to the SCCF.
 - You can place your gift into any of our existing charitable funds. Or you can use your gift to create your own Donor Advised Fund in your name, in the name of your family or business, or in honor of any person or organization you choose. You can then stay involved in recommending uses of the fund.
 - Your gift qualifies for a tax deduction based on the full market value of your stock on the day of transfer; you avoid the capital gains tax that would otherwise arise from the sale of this stock.
- Your gift may be qualified for Endow Iowa Tax Credits equal to 25% of the gift.**
- The SCCF handles all the administrative details through our affiliation with the Community Foundation of Greater Des Moines.
 - Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. The earnings from your current and future gifts to the fund provide a permanent source of community capital, helping do good work today and in the future.

Generating a return for your community

“Our stock returns provided the means for giving to our community,” say Joanne and Gerald Johnson. That’s why they joined the many people who choose to contribute appreciated stock to open a Donor Advised Fund. Last year, The Johnson Fund supported a local family outreach program, a homeless shelter, and a local theatre group. “Some of our charities are too small to accept direct stock gifts,” says Joanne. “Giving through the community foundation eliminates that barrier.” The Johnsons receive a tax deduction on the full market value of their appreciated stock, while avoiding the capital gains tax that would otherwise arise from sale of this stock. Gerald says, “It’s a simple, satisfying way to give.”