

Donating Appreciated Stock to Science of Spirituality

Make a bigger impact:

You are already supporting Science of Spirituality with your monthly donations from your bank or credit card.

IDEA: Gift Appreciated stock that you have held for over a year.

WHY?

- * **The IRS allows you to pay NO TAX on the growth of your investment whether it is a stock or a mutual fund.**
- * **In certain cases, you could get a full deduction of the ENTIRE MARKET VALUE of the shares you donate. (consult your tax advisor if it applies to you)**

There is no better tax break out there. **Donating appreciated stock** to SOS is a powerful and tax-smart way to contribute

Example:

You bought a stock for \$50. After holding it for a year or more - It's now worth \$100.

Option 1- You Sell your stock → Get \$100 and then pay the taxes which could be \$15 on the gain of \$50. SOS gets the money after taxes or \$85.

Option 2- You Donate your stock → SOS Gets \$100 – You pay no taxes on the gain in the value of your investment, and you could get a tax deduction of up to \$100 on your tax return.

Once we receive the stock, you'll get a tax receipt based on the average of that day's **high and low trading price.**

How to Donate Appreciated Stock

Ask your broker to transfer shares to: (for questions contact donate@sos.org)

- * **Account Name:** Science of Spirituality Inc.
- * **Broker:** Fidelity Investments
- * **Address:** 1823 Freedom Dr, Naperville, IL 60563
- * **Phone:** 800.373.6973 or 800.844.6666
- * **SOS Account #:** X91706490
- * **Fidelity DTC #:** 0226

Your gift helps humanity transcend the challenges of life.