

Gifts of Stock, Securities or Other Appreciated Assets to Reliant Mission, Inc.

Thank you for your interest in supporting the ministry of Reliant Mission by considering a gift of stock, securities, or other appreciated assets.

Because Reliant is a qualified 501(c)(3) non-profit organization, charitable contributions to Reliant are tax deductible as permitted by law.

When considering a gift of stock, securities or other appreciated assets (e.g., real estate) to Reliant, there can be two significant tax benefits to you as the donor.

- First, to the extent you have any capital gains resulting from the appreciation of the asset you donate, *you will not be required to pay any capital gains tax on that appreciation*. For example, if you paid \$10,000 for 100 shares of stock and donate that stock to Reliant when its fair market value is \$25,000, you will not pay any tax on the \$15,000 gain in the value of the stock.
- Second, if you have held the property for more than one year (resulting in long-term capital gains), you are also entitled to *an income tax deduction for the fair market value of the property* as of the date you donate that property to Reliant. Using the above example, you would be eligible to deduct \$25,000 from your current year income, up to a fixed percentage (generally 30 percent for capital assets) of your adjusted gross income. You may also carry over any unused portion of that deduction for up to five subsequent tax years. (For stock that has been held one year or less, your deduction is limited to the fair market value less the amount the stock has appreciated since you acquired it – typically your basis in the property.)

Because unique circumstances may apply to your situation, we recommend that you consult your tax advisor in determining the deductibility of a gift of appreciated assets to Reliant.* You may also wish to consult IRS Publication 526, Charitable Contributions, for more information.

If you have any questions about giving to Reliant, please feel free to contact me, or our donor services department at 877-614-4600.

Thank you for generously supporting the work of Reliant Mission.

This communication is not intended to be legal or tax advice by Reliant and is not intended to apply to any specific tax situation. Please consult your tax advisor.

Judi Major
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