



ESTATE PLANNING & CHARITABLE GIVING

Gifts of Stock Transfers

Giving gifts of appreciated stock (including mutual funds and bonds) can be a great way of supporting the Placer SPCA – and you! A gift of appreciated stock often provides increased tax benefits, along with the satisfaction of contributing to a cause you believe can make a difference.

Tax Benefits of Donating your Stock

Charitable contributions of appreciated stock can provide two potential income-tax advantages. The first is a charitable deduction – which is generally for the fair market value of the stock at the time of the contribution, subject to certain tax law limits. The second potential benefit is that you are not taxed on the capital gain that would result if you sold the stock outright.



Transferring your Stock to the Placer SPCA

Once you have identified appreciated stock you would like to transfer to the Placer SPCA, please call our Development Office. It's a simple process that can be handled over the phone.

If your stock has lost value, as opposed to transferring the stock to the Placer SPCA, you may want to consider selling the stock and donating the proceeds of the sale instead. By doing this, you are afforded the opportunity to take a tax deduction for the donation, as well as a deduction for the capital loss.

916.782.7722/530.885.7387, ext. 102 funddevelopment@placerspca.org

Placer County's Companion Animal Welfare Experts – Where Your Donations Stay Local

Companion Animal Care Center
150 Corporation Yard Road, Roseville, CA 95678
916.782.7722/530.885.7387 Fax: 916.782.8655

Pet Adoption & Resource Center
1482 Grass Valley Highway, Auburn, CA 95603
530.823.7722

www.placerspca.org

The Placer SPCA is a private, nonprofit organization not affiliated with any other entity.
We do not receive donations through the ASPCA or HSUS.

Planned Giving Options

Please see detailed handouts for more information

♥ Including the Placer SPCA In Your Will, Trust, or Estate

If your goal is to defer a gift until after your lifetime, make this your gift...By making a bequest in your Will, your donation will be exempt from federal estate taxes.

♥ Charitable Gift Annuity

If your goal is to supplement your income with fixed annual payments make this your gift...With a charitable gift annuity, you enter into a contract with the Placer SPCA and receive fixed annual payments while realizing current and future tax savings.

♥ Giving Through Life Insurance

If your goal is to make a large gift with minimal cost to yourself make this your gift...With a life insurance gift, you give a policy, making the Placer SPCA the owner and beneficiary, and taking a current income tax deduction.

♥ Gifts of Appreciated Stock

If your goal is to make an immediate gift and maximize your tax benefit, make this your gift...With a gift of appreciated stock, your tax benefit is generally the fair market value of the stock at the time of your gift.

Other Giving Options

♥ Revocable Gift in a Living Trust

If your goal is to make a revocable gift during your lifetime, make this your gift...By creating a living trust, you name the Placer SPCA as the beneficiary of your assets while keeping control of your trust during your lifetime.

♥ Retirement Plan Gift

If your goal is to avoid the double taxation on retirement plan assets, make this your gift...With a retirement plan gift, you name the Placer SPCA as the beneficiary of the remainder of assets after your lifetime, avoiding heavily-taxed gifts to your heirs.

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