



· DIOCESE OF FALL RIVER ·
INSPIRED BY THE SOUL OF CHRIST TO LEAVE A LEGACY OF FAITH

GIFTS OF STOCK AND APPRECIATED ASSETS

Giving stock can be more beneficial than giving cash!



HOW IT WORKS

- You transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to The Catholic Foundation.
- The Catholic Foundation sells your securities and uses the proceeds to fund a program at The Catholic Foundation that you choose.

BENEFITS

- You receive an immediate income tax deduction for the fair market value of the securities on the date of transfer.
- You pay no capital gains tax on the transfer when the stock is sold.
- Giving appreciated stock can be more beneficial than giving cash. The “cost” of your gift is often less than the deduction you gain by making it.

For more detailed information on making a gift to the Catholic Foundation for the benefit of the Diocese of Fall River, please contact us so that we can assist you through every step of the process.

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