

## Donating Appreciated Securities

One tax-advantaged way to support Cloverleaf is to donate appreciated securities. Giving stocks, bonds, mutual funds or exchange-traded funds (ETFs) that have increased in value (which you've owned for more than a year) can provide you with greater tax benefits than giving cash. Typically, you can deduct the full market value of the securities and avoid paying capital gains taxes on the appreciation.

To donate appreciated securities, please transfer them to:

**Charles Schwab**

**Code#: 40**

**Account # 39601670**

**Account Name: Cloverleaf Equine Center Stock Gift Account**

If you have any questions or problems with the process, please contact:

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Please write to Development Director Patrick McCormick at [pmccormick@cloverleafequine.org](mailto:pmccormick@cloverleafequine.org) to let us know to expect your gift, since incoming shares often have no identifying information, or if you have any questions. Thank you!