



BIGHORN
RIVER ALLIANCE

**Increase Your
Giving and Reduce
Your Taxes While
Supporting Bighorn
River Conservation**

**Make the Most of
Your Investments,
Save Money and
Avoid Tax with Gifts of
Appreciated Securities**

LET US HELP YOU

If you have any questions about making a gift of appreciated securities or bonds, please contact us. We would be happy to provide you with an illustration with your potential gift benefits.

Contact Melissa

(406) 534 2915
or melissa@bighornriveralliance.org

GIFTS OF STOCKS, BONDS & MUTUAL FUNDS

Did you know that making a charitable gift of appreciated stocks, bonds or mutual funds can save you taxes? Giving these investment assets is easier than you may think and it is one of the most tax-effective ways for you to make a gift to support the causes that matter most to you.

BENEFITS OF GIVING YOUR INVESTMENTS TO CHARITY

When you make a gift of your securities or bonds to a charitable organization like ours, you benefit in the following ways:

- You receive a charitable income tax deduction, for the market value of your gift. This translates into tax savings on your next income tax return!
- If you make a gift, rather than sell your appreciated investment, you avoid capital gains tax otherwise due.
- Because you are making a gift of an asset, your gift will not adversely affect your cash flow.
- Making gifts from your assets, instead of from your checkbook, may allow you to make a greater gift than you ever thought possible.

HOW TO GIVE A GIFT OF SECURITIES & BONDS

If you own assets in a brokerage or investment account, please contact us with your name, your broker's name and the stock you'll be transferring.

Please provide the following information to your broker:

Bighorn River Alliance, Inc. is a 501(c)3 corporation, EIN 36-5177006.

DTCC Number: 0164

Account Name: Bighorn River Alliance

Account # for Deposit: 5930-7230

Financial Institution: Charles Schwab

Account Representative: Capstone Wealth Management - Kerrie Kern
(406) 325-1500 or kkern@capstoneretire.com
1731 Poly Dr, Billings MT, 59102

Please have your broker notify Melissa via email at:
melissa@bighornriveralliance.org when a transfer has taken place.

Questions can go to Melissa at (406) 534-2915.

SECURITIES AND BONDS GIFT PLANNING STRATEGIES

You can make a significant difference by giving appreciated assets:

1. **Outright Gift** - One of the simplest ways to make a gift to support Bighorn River Alliance is by giving us the asset to us directly. For example, you can transfer a few shares of stock that is overrepresented in your portfolio.
2. **Gift to a Donor Advised Fund** - Contributing appreciated assets to a donor advised fund (DAF) allows you to make grants each year to support The Bighorn River Alliance and other causes you care about.

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