

Hunterdon Health Foundation Stock Transfer Instructions

Donations of appreciated securities (such as stocks, bonds, or mutual funds) can be made directly to Hunterdon Health Foundation. This is a highly tax-efficient way to give that can help the donor:

1. **Avoid capital gains tax.** If you sell appreciated securities, you are typically subject to capital gains tax on the increase in value since you purchased them. By donating the securities directly to Hunterdon Health Foundation, you avoid paying this tax, as qualified nonprofits are exempt from paying capital gains taxes.
2. **Maximizing Charitable Deduction.** You can generally deduct the full fair market value of the donated securities on the date of the gift (if you've held them for more than one year), subject to IRS limits.
3. **Increase the gift's impact.** By avoiding the capital gains tax, Hunterdon Health Foundation receives the full value of the appreciated asset, making your donation more impactful compared to selling the asset and donating the after-tax proceeds.

Consult a financial advisor or tax professional to tailor this strategy to your specific financial situation. If you wish to donate appreciated securities, you may provide the following instructions to your asset manager or complete the transaction yourself:

- Hunterdon Health Foundation now accepts stock donations through [FreeWill's private, secure platform](https://www.freewill.com/stocks/hunterdonhealth). Please visit <https://www.freewill.com/stocks/hunterdonhealth>.
- You will see the following information on the page and click Donate Stock Today to enter the tool. Financial advisors completing information on behalf of clients can check the box indicating such on the first page of the tool.

Donating stock and securities doesn't have to be complicated.

When you donate securities, you make an outsized impact without taking money directly out of your bank account. Plus, neither you nor Hunterdon Health will be taxed on the gains for appreciated assets you donate.

Donate stock today

Powered by: **FREEWILL** 

🔑 Done in under 10 minutes 🔒 Secure and encrypted



Hunterdon Health

Hunterdon Health Foundation

- FreeWill has agreements with many brokerage firms that are integrated with the tool to make stock donation transactions simple.

Gift Details

What is the name of your financial institution?*

Select a brokerage

Select a brokerage

Ally Bank

Ameriprise

AXA

Charles Schwab

Citi

E Trade

Edward Jones

Fidelity

Interactive Brokers

JP Morgan

LPL

Merrill Edge

Morgan Stanley

Raymond James

TD Ameritrade

UBS

Vanguard

Wells Fargo

Other

- When received from your brokerage, stocks are temporarily placed in the FreeWill Impact Fund and distributed to Hunterdon Health Foundation immediately.



Please reach out to the Foundation office at 908-788-6141 or foundation@hhsnj.org if you have any questions or encounter any problems with the tool.

Tools are also available to make a [tax-smart gift](#) from your IRA, Donor Advised-Fund (DAF), or cryptocurrency portfolio. Please visit <https://www.freewill.com/smartgiving/hunterdonhealth> for access to these tools.

Hunterdon Health Contact Name

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