



CONSERVATION.

EDUCATION.

ADVOCACY.

### **The Benefits of Donating Appreciated Securities**

Thank you for considering a gift of appreciated stocks, bonds, or mutual fund shares to the Indiana Wildlife Federation!

Appreciated-share gifts provide a double tax benefit to you. You pay no capital gains taxes on the appreciation value of your shares (your profit), and you can claim the full value of the donation as an itemized deduction.

When you transfer appreciated securities to the Indiana Wildlife Federation, we use the proceeds from subsequent security sales to fund our conservation work throughout Indiana.

### **How to Transfer Shares Directly to IWF**

Direct "in-kind" transfers from a non-retirement brokerage account are a cost-free and efficient transfer method.

Transfers must be initiated by the sender. To have securities sent out of your account, complete your custodian's paperwork with the following information for the IWF's brokerage account:

Receiving Firm Name: Fidelity Investments  
DTC Number: 0226  
Receiving Account Name: Indiana Wildlife Federation  
Receiving Account Number: 672-592765  
Recipient's Registration Type: Corporation

### **Considerations**

Please note that your deduction for donating in-kind appreciated securities is currently limited to 30% of your adjusted gross income (AGI). If your donation exceeds this level, you may carry forward and (make use of) unused deductions for five years.

If you have held your shares for at least one year before your donation, then you can deduct the full fair market value of your donated shares. Otherwise, if you held your shares for less than one year, your deduction is limited to your cost basis.

Lastly, please notify us when making a donation. We do not receive information about the sender and will not know where to send an acknowledgement and tax confirmation of your gift. Please contact our executive director Emily Wood by calling 765-749-9397, or emailing [wood@indianawildlife.org](mailto:wood@indianawildlife.org).

708 E Michigan Street, Indianapolis, IN 46202 | [www.indianawildlife.org](http://www.indianawildlife.org) | (317) 875-9453

Indiana Wildlife Federation, Inc. is a nonprofit, tax-exempt charitable organization under section 501(c)(3) of the Internal Revenue Code (EIN: 35-1058426). Membership fees and donations are tax-deductible as allowed by law.

