



## Donating Stock, Securities, or IRA funds to Partners for a Hunger-Free Oregon

When you give a gift of appreciated securities or funds (stocks, bonds, Donor Advised Funds, mutual funds, or IRA distributions) you can help end hunger in Oregon *and* reduce your taxes.

### Tax-Free Stock Donations

By contributing appreciated securities to Partners for a Hunger-Free Oregon, you can avoid the capital gains tax that would otherwise be due if you sold the securities. *We strongly advise you contact your accountant or tax advisor to determine the exact income tax effect of your gift.*

- You must itemize your tax return in order to deduct a charitable donation.
- You must have owned the securities for at least one year before donating.
- You may take a deduction valued up to 30% of your adjusted gross income.

### It's Easy to Transfer Stock as a Donation - Here's How

☞ If you do not have physical possession of the stock certificate please notify your broker to initiate a "broker to broker" transfer. If you have physical possession of the actual stock certificate, or if you hold mutual fund shares, please contact us at 503-595-5501 ext. 306; [marianne@oregonhunger.org](mailto:marianne@oregonhunger.org).

☞ Your broker may electronically transfer the gift directly to our account at Ameritrade  
DTC # 0188 | Partners for a Hunger-Free Oregon | Ameritrade Account # 488-527862  
Ameritrade | [www.tdameritrade.com](http://www.tdameritrade.com)  
PO Box 2577 | Omaha, NE 68103-2577 | FAX: 866-468-6268

☞ It's important you (or your broker) contact us at 503-595-5501 ext. 306 or [marianne@oregonhunger.org](mailto:marianne@oregonhunger.org) that the gift is being transferred to our account, as the stock will arrive in our account without identification. When you contact us, please include the donor name and mailing address where we can send a tax receipt.

### Tax Deductions and the Date of Your Gift

The date of the gift is the day the stock passes from your control. For gifts of securities held longer than one year, the value for income tax purposes is the mean between the high and low quoted selling price on that day.

### Tax-Free IRA Distributions

People older than 70½ can donate up to \$100,000 per year from their traditional IRAs to a nonprofit like Partners for a Hunger-Free Oregon, which may count as their required minimum distribution but may not be taxable if they follow the rules for a qualified charitable distribution (this doesn't apply to a Roth IRA). The gift stays out of your adjusted gross income only if you make a direct transfer from your IRA. Ask your IRA administrator for details.

Thank you for considering a gift to help end hunger in Oregon!

#### Contact us:

Marianne Germond | Operations Director | 503-595-5501 x306 | [marianne@oregonhunger.org](mailto:marianne@oregonhunger.org)

Partners for a Hunger-Free Oregon

Mailing: PO Box 14250, Portland OR 97293 | Location: 2900 SE Stark St, Ste 1A, Portland OR 97214

>> We are a 501c3 nonprofit organization | EIN 20-4970868 | [www.oregonhunger.org](http://www.oregonhunger.org)