

Donating Appreciated Stock or Mutual Funds to Life Centers of Ventura County

A gift of appreciated stock or mutual funds to Life Centers of Ventura County is a great way to help. This type of gift may provide more benefits than a cash gift.

A gift of stock or mutual funds may be right for you if:

- You are holding highly appreciated stock or mutual funds. By gifting the stock or mutual fund directly to Life Centers of Ventura County, you can avoid the capital gains tax on the profit.
- You would like to maximize your tax deduction while not affecting your liquidity. If you decide to make a gift of stock or mutual funds, you not only retain your cash assets, but you also could receive a charitable tax deduction for the full market value of the stock or mutual fund that you've owned for more than one year.

There are income limitations on your charitable deductions (cash and property) each year so be certain to talk to your tax professional in order to maximize your tax savings.