

**JEFFERSON COUNTY COMMUNITY FOUNDATION**  
**How to Make a Gift of Stock**

Jefferson County Community Foundation provides a simple, powerful and highly personal approach to giving with a variety of tools to help you achieve your charitable goals.

It is easy to make a gift of publicly traded securities to the Jefferson County Community Foundation. By transferring appreciated stock to the Jefferson County Community Foundation via the Greater Tacoma Community Foundation (our investment partner) a donor can avoid capital gains taxes and use the fair market value of the stock on the day of transfer as the contribution amount. All the administrative details will be handled for you!

**Step One:** Contact the Jefferson County Community Foundation by calling Kris Mayer at 360-379-3667 or emailing [Kris@jccfgives.org](mailto:Kris@jccfgives.org)

**Step Two:** Let Kris know how many shares, the exact name of the stock and the date of transfer.

**Step Three:** Kris will inform you of the broker and the account numbers necessary to complete the wire transfer.

**Step Four:** After the stock is received, it is sold immediately and the proceeds deposited into the appropriate account.

**Step Five:** The donor receives a donor letter from the Greater Tacoma Community Foundation on behalf of the Jefferson County Community Foundation which confirms the stock transfer including the number of shares, and fair market value. This letter can be used as documentation for your individual tax return.