

# Your Legacy of Hope:

Strategic Giving that Benefits You and  
Cancer Support Community Pasadena



CANCER SUPPORT  
COMMUNITY

PASADENA

## WHEN TO CHOOSE A GIFT OF STOCK OR MUTUAL FUNDS

### Your needs and desires

You desire to provide an immediate donation to *Cancer Support Community Pasadena* while **minimizing capital gains taxes**. In addition, you want to receive the **maximum charitable tax deduction possible** for your donation.

### Why a Gift of Stock or Mutual Funds may be a wise choice

Donating appreciated stock or mutual funds directly to *Cancer Support Community Pasadena* offers you several benefits while strengthening our work:

- You may deduct the present market value of the asset from your income tax (up to 30% of your adjusted gross income), regardless of your cost basis. A contribution amount that exceeds the threshold may be carried over for up to five years.
- By donating the asset (rather than selling it and donating the proceeds), you eliminate your capital gains taxes. (If the asset has depreciated in value, you will want to sell it and donate the proceeds so you can claim the capital gains loss.)
- You will be welcomed into our *Legacy of Hope Society*, a group of likeminded men and women who share your commitment to making sure that future generations will have our support on their cancer journey. As a member, you will be entitled to all benefits of this exclusive society.
- You will be assured that your life will be a living legacy through the work of *Cancer Support Community Pasadena*.

### How to give a gift of Stock of Mutual Funds

Please work directly with your stock broker or mutual fund manager to arrange a donation of stock or a mutual fund to CSCP. It is important to determine if the asset has appreciated or depreciated in value as this will effect whether you donate the asset directly or sell it and donate the proceeds.

### What steps to take to make this gift

We welcome an opportunity to have a confidential conversation with you and/or your advisor at no obligation if you desire. To make your gift, please instruct your stock broker or fund manager to initiate the transfer of ownership to CSCP. To transfer the ownership of the asset electronically, please provide your broker/manager with the following information:

CSCP Broker: D A Davidson & Co.  
DTC Number: 0361  
Account Name:  
Cancer Support Community Pasadena  
(Tax ID# 95-4201985)  
Account Number: 7681-9176

When making any planned gift, please notify us of your intentions so we can honor your desires and welcome you into the *Legacy of Hope Society*. Thank you!

The mission of Cancer Support Community is to ensure that all people impacted by cancer are empowered by knowledge, strengthened by action, and sustained by community. Your Legacy of Hope Gift to Cancer Support Community can extend this mission for generations to come.

The above information is not intended as legal or financial advice; please consult with your financial advisor and/or tax attorney on the best way to prepare an estate plan or legacy gift strategy for yourself and your family. Cancer Support Community Pasadena is a 501(c)(3) nonprofit organization; our Federal Tax I.D. number is 95-4201985.