



## GIFTS OF APPRECIATED SECURITIES

A gift of appreciated marketable securities is an easy and prudent way to gain substantial tax benefits while helping Hartley Nature Center. Gifts of appreciated securities that you have held long term (more than one year) are fully deductible at fair market value, and you avoid tax on unrealized capital gain.

### When is it wise to donate securities?

Consider a gift of appreciated securities whenever you prefer not to incur capital gains tax, such as in these circumstances:

- When you wish to upgrade your portfolio
- When you wish to donate cash or holdings in your closely held corporation
- When you wish to increase your cost basis in stock you intend to hold
- When you wish to avoid capital gains tax

### Ways to donate appreciated securities

By phone: If your broker or bank holds your securities:

- 1) Instruct your bank or broker to transfer your gift of securities to Hartley Nature Center electronically. To use an electronic transfer, ask your broker to call 218.724.6735 for routing instructions.
- 2) Write a brief note identifying yourself (name, address, phone number) describing the number of shares, the name(s) of the stock(s), your broker's name and phone number, and mail your note on the same day to: Hartley Nature Center, 3001 Woodland Avenue, Duluth, MN 55803



*To discuss gifting opportunities, please contact:*

**TOM O'ROURKE**, EXECUTIVE DIRECTOR  
HARTLEY NATURE CENTER • 218.724.6735 OR VISIT [HARTLEYNATURE.ORG](http://HARTLEYNATURE.ORG)