



**THE COMMUNITY FOUNDATION
of FREDERICK COUNTY**
For Good. Forever. For Frederick County.

How to Give a Gift of Stock

The Community Foundation often receives gifts through the transfer of stock and mutual funds. These gifts are added to existing funds, or used to create new funds. Transfers of appreciated stocks and mutual funds are a great alternative to cash as a tax-deductible charitable gift.

There are several important pieces of information that will help you or your professional advisor facilitate a stock or mutual fund transfer and ensure it can be credited for the current tax year:

- Transfers of mutual funds are recommended to be completed by December 1.
- Transfers of stocks are recommended to be completed by December 15.
- Contact Gail Fitzgerald, Community Foundation CFO, for assistance in obtaining the correct transfer instructions. It is also helpful for Gail to know to expect the transfer and the name of the donor and the stock, as this will expedite the processing of the gift and gift acknowledgement letter once the transfer is completed. Gail can be reached by [email](#) or by phone at 301.695.7660

As your charitable giving resource, the Community Foundation staff stands ready to assist you with facilitating your client's charitable goals.