

GIFTS OF STOCK AND APPRECIATED ASSETS



HOW IT WORKS

- You transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to the La Crosse Symphony Orchestra.
- The LSO sells your securities and uses the proceeds for our programs.

BENEFITS

- You receive an immediate income tax deduction for the fair market value of the securities on the date of transfer (even if you originally paid much less for them).
- You pay *no capital gains tax* on the transfer when the stock is sold.
- Giving appreciated stock can be more beneficial than giving cash. The "cost" of your gift is often less than the deduction you gain by making it.