



**#SecuritiesForSecurity**  
**Resource Kit for Nonprofits**



# Part I. Set Yourself Up for Success: Accept Gifts of Appreciated Securities

*Why?* When donors give appreciated securities (stocks, bonds, or mutual fund shares), they don't have to pay a capital gains tax and can take a charitable deduction on the current value of their shares, making it a tax-savvy way to give to their favorite nonprofit organizations.

Tax deductions are greater on appreciated stock than cash, and donors can make a larger gift at essentially the same investment for them.

## How to accept gifts of stock:

1. Open a brokerage account.
2. Monitor this account daily for new stock donations so you can immediately value the shares received for donor tax receipts.
3. Create a stock giving page on your website to let donors know that this giving option is open to them.
4. For increased security, don't feature your transfer details directly on your stock giving webpage. Instead, collect the donor's information first. Ask the donor to email a designated contact person or to complete a form on your website that links to another page or triggers an automatic email that has your organization's transfer information (e.g., brokerage name and address, your DTC info to initiate the transfer). Rapid response is important, as a delay can result in a lower amount of completed gifts.
  - a. Ask the donor to contact their broker and obtain a stock donation transfer form. Also ask for contact details, what kind of shares they are transferring, the date they plan to donate, if they are giving stock that has gone up in value, and if it has been held for more than a year. Sometimes stocks are transferred with no information about the account holder who made the donation, so it's important to ask upfront so you can appropriately thank the donor in follow up.
5. It's best practice to sell the donated shares the day you receive them to avoid any accounting discrepancy between the donated value and the actual cash proceeds.
6. Thank donors and send a tax receipt. Your tax receipt should include the date of transfer, value of the donation, number of shares, and the stock's ticker name.
7. Make sure to enter the amount of the gift, date of gift, and campaign source of gift in your database and note the asset type (e.g., stock, QCD, DAF).
  - People who give by stock once are likely to give again by stock. They are also likely to make the gift around the same time of year. That's because this is likely the time that they meet with their financial advisor or accountant, or simply take the time to think about their giving and taxes.
  - If you have the date, amount and type of gift, you can use that information to renew your donor at the same time – ideally reaching out a bit before so that you do not miss the window of opportunity – with an ask for a gift of stock. Specifying the gift type reminds the donor that this is how they chose to support your organization last time. You can also use the last gift amount to inform how much to ask for as a renewed gift. If the donor gave \$5,000 in stock, you can ask for an upgraded amount of \$5,500-\$6,000, for example – especially if the market has been strong!

## Part II. Communicate with Your Donors about Giving Securities

As fundraisers, we know that if we want something, we must ask and be direct.

The most successful fundraising campaigns use multiple channels and multiple contacts to achieve a gift. The same is true for asking for a gift of stock. It requires asking in a direct way through many platforms, like:

- Direct marketing (business reply card (BRC), outer envelope, special buckslip encouraging alternative ways to give)
- Email marketing (appeals, cultivations)
- Social media (advertising, organic posts)
- Website (slider or lightbox on homepage, donation page)

See Part III for templates to help you communicate across your organization's platforms.

### **Make sure your organization can accept gifts of securities before communicating about it!**

Once you start communicating about gifts of stock and receive them, your systems must be prepared to receive the gifts and follow up with donors to optimize your chances that they will give gifts of stock again in the future.

At year end, when people make their tax-savvy giving decisions, make sure that you ask directly and on multiple occasions for gifts of securities.

Use the hashtag #SecuritiesForSecurity to promote this giving method online to gain more visibility. The more we work together to spread awareness about the power and advantages of giving stock, the more people will do so.

## Part III. Templates

### **Website Stock Giving Copy**

You can support [ORGANIZATION NAME] with gifts of appreciated securities (like stocks, bonds, or mutual fund shares).

Your gift will [SHARE IMPACT RELATED TO YOUR ORGANIZATION'S MISSION]!

When you donate stock, you can deduct the gift as a charitable donation and avoid capital gains tax at transfer. This allows you to leverage a larger donation to support [ORGANIZATION].

Contact NAME at EMAIL for more information [[or ask donor to fill out a form that leads to your nonprofit brokerage details OR triggers an email reply with your brokerage details](#)]

For tax-receipt purposes, please email or send your (or the donor's) name with contact details and the type and number of shares to:

Contact Name

Organization Name

Organization Address

City, State, Zip

Phone Number

Email

Include the #SecuritiesForSecurity logo to link your own stock giving awareness back to this campaign!

### Email Blast Template

Subject line: Support [ORGANIZATION NAME] with #SecuritiesForSecurity

Dear [DONOR NAME/Friend],

First, let me thank you for being a dedicated friend of [ORGANIZATION]. Without your support, we would not be able to [INSERT 1-2 SENTENCES ABOUT PROGRAMS/IMPACT MADE POSSIBLE BY DONOR SUPPORT].

As we approach the end of the year, I want to tell you about a way that many of our dedicated supporters, like you, are making a big impact while saving money in the process.

**Donating appreciated securities is one of the smartest ways to give. Why? When you donate securities, like stocks, you avoid paying capital gains tax, and you can deduct the gift as a charitable donation.**

<<link in button>> Give #SecuritiesForSecurity <<link in button>>

I hope you find this information useful. And consider sharing the hashtag #SecuritiesForSecurity to let others know when you support [ORGANIZATION] in this tax-savvy way.

Sincerely,

[SIGNATURE]

P.S. Remember, for your gift to be eligible for your 2021 tax return, you must give by December 31, 2021.

### Social Media Templates

The following are a series of sample tweets or captions you can use on your social platforms to drive stock donations. Feel free to make them your own and adapt to each platform that you use! And check out the graphics we made for you too!

### Suggested Hashtags

#SecuritiesForSecurity

#GiveStockforGood

### Templates

- **November 28 - Day Before Stock Monday**  
Tomorrow is #StockMonday! Donate #SecuritiesForSecurity and maximize your impact while minimizing your tax burden.

You can support us with a stock donation here: [LINK TO STOCK/SECURITIES GIVING PAGE](#)

- **November 29 – Stock Monday**  
#SecuritiesForSecurity

It's #StockMonday! Support us today in this tax-savvy way: [LINK TO STOCK/SECURITIES GIVING PAGE](#)

- **November 30 – Giving Tuesday**  
#SecuritiesForSecurity

Today is the biggest giving day of the year, #GivingTuesday! Your support can make an even bigger impact this year when you donate appreciated securities like stock: [LINK TO STOCK/SECURITIES GIVING PAGE](#)

- **Through Year-End**

Throughout December, giving #SecuritiesForSecurity is to the perfect way to support us and make a difference!

Give stock today: [LINK TO STOCK/SECURITIES GIVING PAGE](#)

## Graphics Templates

### Logos



### Social Media & Email Banners



All graphics are available to download in [Dropbox](#).

**If you would like help optimizing your #SecuritiesForSecurity campaign, please contact Faircom New York at [info@faircomny.com](mailto:info@faircomny.com).**

[#SecuritiesForSecurity](#) is an initiative of [Faircom New York](#).

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