



Bayfield Regional Conservancy

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Gifts of Stock

Appreciated stock is an excellent choice for funding charitable gifts because it can offer significant tax benefits for you without impacting cash flow. In fact, to offset a capital gain event during the tax year, many donors gift shares of stock or mutual funds to counter an anticipated capital gain tax. Typically, selling an appreciated stock triggers a tax on the realized gain—the difference between what you paid to purchase the stock and its current value.

When you make a gift of appreciated stock to the BRC and we sell the stock, the taxable event and the fees are avoided because the charity is tax-exempt. Plus the donor can take a sizeable charitable deduction on his/her taxes—a deduction that can be used to offset other taxable events.

Contact your tax advisor for answers to questions about your particular situation.

Please contact us for instructions on gifting stock.

Mission Statement: *The Bayfield Regional Conservancy is a locally based non-profit land trust dedicated to the permanent protection of natural and scenic areas, lakeshores, rivers, wetlands, forests and farmlands for their aesthetic and ecologic value. The preservation of wildlife areas and sites of established public use or historic significance is also an objective. Conservation easements, partnerships or land acquisition in the Bayfield region of northern Wisconsin are used to achieve these goals.*