



Donating Stock to TFI

The Forgotten International accepts donations of stock. When stocks are received, they are immediately liquidated and the funds are used to support the programs we work with:

- General Grantmaking: three dozen grassroots organizations across 11 countries
- Bridge Fund: domestic giving for small emergency grants
- Medical Assistance Fund: supporting medical needs in underserved communities
- Children's Fund: long-term support for impoverished children's education

If you pay taxes in the United States, "Donating stock directly to charity is one of the most tax-smart ways to give. Yet, it is often not well understood or widely used. According to a study done by Fidelity Charitable, 80 percent of donors own appreciated assets, such as stocks, mutual funds or bonds, but only 21 percent of those donors have contributed these types of assets to charity."

~ from FidelityCharitable.org

Four reasons to give a stock donation:

- 1) You can donate the full value of your stock without paying capital gains tax.
- 2) You can potentially reduce future capital gains tax by resetting your cost basis.
- 3) You can give your portfolio a health check.
- 4) You can donate stock easily with the information below.

Discuss your personal financial situation with your financial advisor for a full explanation, but for general information, here is a [link to a Fidelity article on donating stock](#).

If you are interested in donating stock in any amount to TFI, please contact Jennifer by email at jennifer@theforgottenintl.org or by phone at 415-218-9772. We can put you in contact with our Representative at Fidelity who will help you process the transaction.

Fidelity Investments is the custodian and their DTC number is 0226. The account receiving the stock is The Forgotten International with the account number: 638-276660.