



GIFTS OF APPRECIATED STOCKS, DONOR ADVISED FUNDS AND IRAS

Make a tax-smart gift from stock, your Donor Advised Fund, or a qualified IRA distribution to Friends of Sausal Creek to support the health and resilience of the Sausal Creek Watershed.

Donate Stock or Mutual Fund Shares

A donation of appreciated securities—including stocks and mutual fund shares—can offer substantial advantages, including a charitable deduction for the full market value and avoidance of the capital gains taxes you would owe if you sold the shares yourself. To receive the full tax benefit, securities must be held for more than one year.

How to Give Stock or Mutual Fund Shares

1. Have your broker transfer the shares directly to Friends of Sausal Creek
2. Because donor details don't always accompany transfers, please send the following information to our Development and Engagement Manager at kate@sausalcreek.org:
 - i. Name of stock or fund & ticker symbol
 - ii. Number of shares being donated
 - iii. Intended date of transfer
 - iv. If you would like your gift directed to our endowment fund or to support current operations

Friends of Sausal Creek Stock Transfer Information

1. Broker: Vanguard
2. Account: 69665009
3. DTC: 0062
4. Tax ID: 91-2147216

Donate Through a Donor Advised Fund

A donor-advised fund (DAF) is a giving tool that combines strong tax advantages with the flexibility to support the causes you care most about. DAFs are growing in popularity as they offer an easy way to streamline your charitable giving.

When you make a gift through your DAF, the sponsoring organization may not provide your contact information. To help us acknowledge your generosity and direct your contribution appropriately, please email our Development and Engagement Manager kate@sausalcreek.org once you have submitted your gift.

IRA Charitable Rollover

If you are 70 ½ or older you can support Friends of Sausal Creek and receive tax benefits by making a direct gift from your IRA. You may contribute up to \$111,000 (tax year 2026) per person per year, and the amount you give will count towards your required minimum distribution (RMD), which begins at age 73. Because the funds go straight to Friends of Sausal Creek, you won't owe income tax on the distribution. This giving method is known as the IRA charitable rollover, or a qualified charitable distribution (QCD).

Important: The distribution must go directly from your IRA custodian to Friends of Sausal Creek to qualify as a QCD. If your IRA custodian issues a check, it should be made payable to Friends of Sausal Creek.

