



# ANDERSON<sup>®</sup>

## UNIVERSITY

### ***Wise stock advice for possible tax savings***

If you give cash to support our work at Anderson University, you may also want to consider giving stock as well. You can then use the cash to replace the stock at a new, higher basis.

You likely have some stocks you have held for years. Perhaps it is time to sell some. If you want to use some of your stocks to have a great impact, consider donating them to the University.

By transferring your stock to AU, you receive an income tax deduction for its current value but pay no capital gains on the transfer. Always check with your financial planner and tax adviser first, but if you want to put old stocks to a new use, we can help you freshen your portfolio.

Please give me a call at 864-622-6079 or email me at [jshirley@andersonuniversity.edu](mailto:jshirley@andersonuniversity.edu) to learn more about tax wise savings options in gifting to Anderson University. I look forward to hearing from you.

Long live Anderson,

Johnna Shirley

Associate VP for Annual and Planned Giving



**Johnna Shirley**

Associate VP of Philanthropy and Estate Planning

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