



The Columbus Park Foundation

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Thank you for considering a gift of securities to the Columbus Park Foundation.

To ensure proper credit of your gift, please notify us in advance of any electronic transfers of securities and tell us what area of interest your gift should be directed.

Donation Areas:

- Area of Greatest Need
- Chuck Wilt Youth Scholarships
- Endowment
- James K. Baker Trees
- Parks & Park Facilities
- People Trails
- Playgrounds
- Pollinator Parks
- Recreation & Playground Program

Donation of Securities Contact:

Jessica Prowant

Columbus Parks and Recreation

jprowant@columbus.in.gov

812-376-2546

Thank You!

The Columbus Park
Foundation
P.O. Box 858
Columbus, IN 47202
(812)376-2680

Charitable Giving

Donating to a charitable organization not only gives you great personal satisfaction, it also provides you with current income tax deductions, lets you reduce capital gains tax, and reduces the amount of taxes your estate may owe when you die.

How do you know if a donation to an organization is tax deductible? The most common type of qualified charity is a 501(c)(3) organization. There are many categories that make an entity eligible to receive charitable donations: charitable, educational, religious, and literary, just to name a few.

Ways to Give

There are many ways to give to charity but two of the most common ways to give are:

- Gifts of cash – If you itemize, you can make the simplest kind of charitable contribution and lower your 2020 income taxes with a cash gift postmarked by December 31, 2020. Because gifts of cash to public charities are fully deductible¹ they are a great way to make a contribution.
- Gifts of securities – While gifts of cash are simple to make and fully deductible, gifts of securities are frequently the most advantageous donation from a tax perspective. Contributing securities to your charitable organization allows you to avoid paying capital gains tax on long-term, appreciated positions. In addition, you still receive an income tax deduction equal to the full fair market value of the security at the time it is contributed.

Securities Gifting Made Easy

Here are the steps that you will need to follow in order to make a charitable securities contribution:

1. Notify your organization that you are gifting securities and notify First Financial Wealth Management.
2. If you are gifting securities held in an investment account with a different broker/dealer, please contact your account representative to transfer your gift electronically.
3. Please provide your advisor with the following information:

Deliver to: DTC #0725
Raymond James & Associates
FAO: **(Heritage Funds of Barth Co & RJ a/c #22778605)**

The proper handling of your gift is important to your organization and to you as the donor. The IRS requires special documentation and proper execution of your gift to qualify for a tax deduction. We recommend that you consult with your tax advisor for details.

Thank you for considering a charitable contribution.

Sincerely,

Jeff Baker
Registered Representative, RJFS
Telephone 812-376-1965

End of year deadlines may vary based on form of gift as well as Broker/Dealer and Transfer Agent Volume.

You should discuss any tax or legal matters with the appropriate professional. The foregoing information has been obtained from sources considered to be reliable, but we do not guarantee that it is accurate or complete. Any opinions are those of [FA Name] and not necessarily those of Raymond James.

Please note, changes in tax laws or regulations may occur at any time and could substantially impact your situation. While we are familiar with the tax provisions of the issues presented herein, as Financial Advisors of RJFS we are not qualified to render advice on tax or legal matters. Any information provided is for informational purposes only and does not constitute a recommendation.

¹ Taxpayers who itemize can generally deduct charitable contributions.