



The Perfect Win-Win Investment:

DONATING APPRECIATED STOCKS AND MARKETABLE SECURITIES

Today is a great time to donate/contribute marketable securities to Tourism Cares (e.g. stocks, ETFs, mutual funds). It's the perfect investment strategy for your appreciated investments held longer than one year:

Donate the asset for Tourism Cares, a 501(c)(3) public charity, for us to sell; and

- **You save more on your income taxes**, as you are able to deduct the full market value of the donation, not the cost basis;
- **You also save on capital gains tax** on the appreciation of the security; and
- **You are able to make an outsized contribution to Tourism Cares** and its charitable programs, utilizing this federal tax benefit as intended – to support the public good through a nonprofit.

<i>Example only: Donating appreciate securities</i>	
Charitable deduction	\$10,000
Ordinary income tax savings (assumes 35% rate)	\$3,500
Capital gains paid (assumes 15% tax rate on \$8,000 gain)	\$1,200
Net tax savings	\$4,500

For illustrative purposes only, the above is one scenario for the possible benefits:

It's easy to do and has abundant financial planning and philanthropic benefits. You can learn more from CBSNews.com and Ml.com/solutions/donor-advised-fund.html articles. These are only examples, please **consult your financial and tax advisor**.

How to donate: please use the delivery instructions provided by **Merrill Lynch Wealth Management**. **Please contact us with the quantity and type of asset** to be donated CFO@tourismcares.org * 617.448.4627

▪ **For physical/overnight delivery**

Merrill Lynch Wealth Management
Mihaela Luminita Dogaru, Registered
Senior Wealth Mgmt. Client Associate
450 N. Stephanie Street, Suite 600
Henderson, NV 89014

▪ **For DTC transfers**

DTC #8862 (Merrill Lynch)
Name Account: Tourism Cares, Inc.
Account#2GQ-02304

- **ML contact:** Mihaela Luminita Dogaru: 702.547.2902, mihaela.dogaru@ml.com
- Please contact Tourism Cares for additional instructions on contributing open-ended mutual funds, US Government securities, restricted stock, and checks and wires.