

# Donating Securities and Appreciated Assets

Photo: Michael Zide

*Save on your taxes while  
saving land in the Valley today.*

Donating appreciated assets like stocks or bonds to Kestrel Land Trust can provide you with potentially significant tax savings while ensuring the places you love will be here for future generations to cherish.

When you donate these assets, you are likely to avoid capital gains tax, which can be substantial if you have owned the assets while they increased in value over a period of years. Consulting your tax advisor is helpful as they may be able to suggest specific strategies or a phased approach to convey all, or a portion, of your appreciated assets.

*We trust Kestrel to work tirelessly, year after year, to ensure that our place on the planet—here in the Valley—will always be a sanctuary for wildlife and for human communities.*

Robert Jonas & Margaret Bullitt-Jonas  
Northampton

**There are two simple steps to convey appreciated securities:**

► **First, inform Kestrel's staff of the number of shares and/or type of securities you are planning to donate.**

This will allow us to thank you properly as securities will be transferred to us without notification of whom they are from.

**Monica Green, Development & Operations Director**  
monica@kestreltrust.org

**Kristin DeBoer, Executive Director**  
kristin@kestreltrust.org

*Kristin and Monica are available to talk confidentially by calling 413-549-1097.*

**More on back ►**

► **Second, whether you are making your gift through an online account or via a broker, the next step is to direct the securities to be transferred to the Community Foundation of Western Massachusetts.**

Please include a memo line stating:

**Gift to Kestrel Fund**

**EIN: 22-3089640**

**Brokerage Account: #73374986**

**Vanguard DTC #0062**

**Address: 33 Bridge Street, Springfield MA 01103**

For assistance at the Community Foundation, contact Deborah Koske, Director of Donor Services by calling her at 413-732-2858, or emailing [dkoske@communityfoundation.org](mailto:dkoske@communityfoundation.org).

We will send you a thank you letter along with the appropriate tax receipt from the Community Foundation.

***Together, we can conserve what matters most, here in the Valley, while there's still time.***



Photo: Mary Ann Cofrin



Photo: Michael Zide

## **Join us to make a Promise to the Valley!**

Come stretch with us and help meet our \$5 million goal to save the lands that matter most in the next 5 years. You'll also ensure Kestrel will be able to care for the land in the Valley far into the future.

People like you have already pledged \$2 million! Along with hundreds of gifts from throughout the community, you will help leverage at least \$15 million more in public grants and landowner gifts to save Valley forests, farms, and trails.

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**[valleypromise@kestreltrust.org](mailto:valleypromise@kestreltrust.org)**  
**413-549-1097**  
**[kestreltrust.org](http://kestreltrust.org)**