



Democratizing charitable stock gifting

Nonprofit Education
May 2022

What to Expect From Today

- Illuminate context, benefits and challenges of stock gifting
- Introduce new solution for growing stock donations
- Share best practices for starting or growing a stock gifting program
- Provide roadmap for getting started

About DonateStock

We are transforming charitable giving by making stock gifting easy and accessible to all



Easy button for stock gifting

- Donate stock in minutes
- Easily deployed by nonprofits



Nonprofit enablement

- Facilitate and convert stock gifts to cash
- Automation, reporting and reconciliation
- Marketing playbook, content, support



Donor education

- Guides, webinars, videos, articles
- Delivered directly and via partners



Easy and affordable

- Free page, tools and support for NPOs
- 3% transaction fee



Leading the stock gifting movement

Supporting Nonprofits of all sizes

Nonprofit News & Associations

National Media Coverage

Giving Tuesday Stock Guides

Celebrity Endorsements

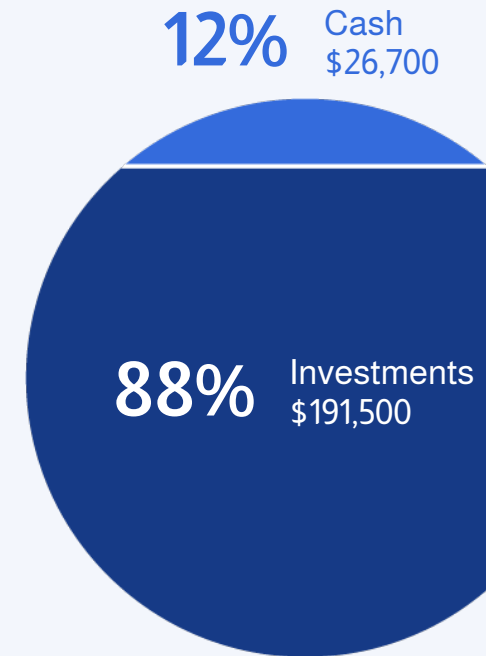
Why Stock Gifting? That's Where the Money is.

Households own a lot of stock (7x cash)

Stock gifting is **the** most tax-advantaged way to give

- [Avoid capital gains tax](#)
- Deduct fair market value of the stock

Median US Household Assets (45+)



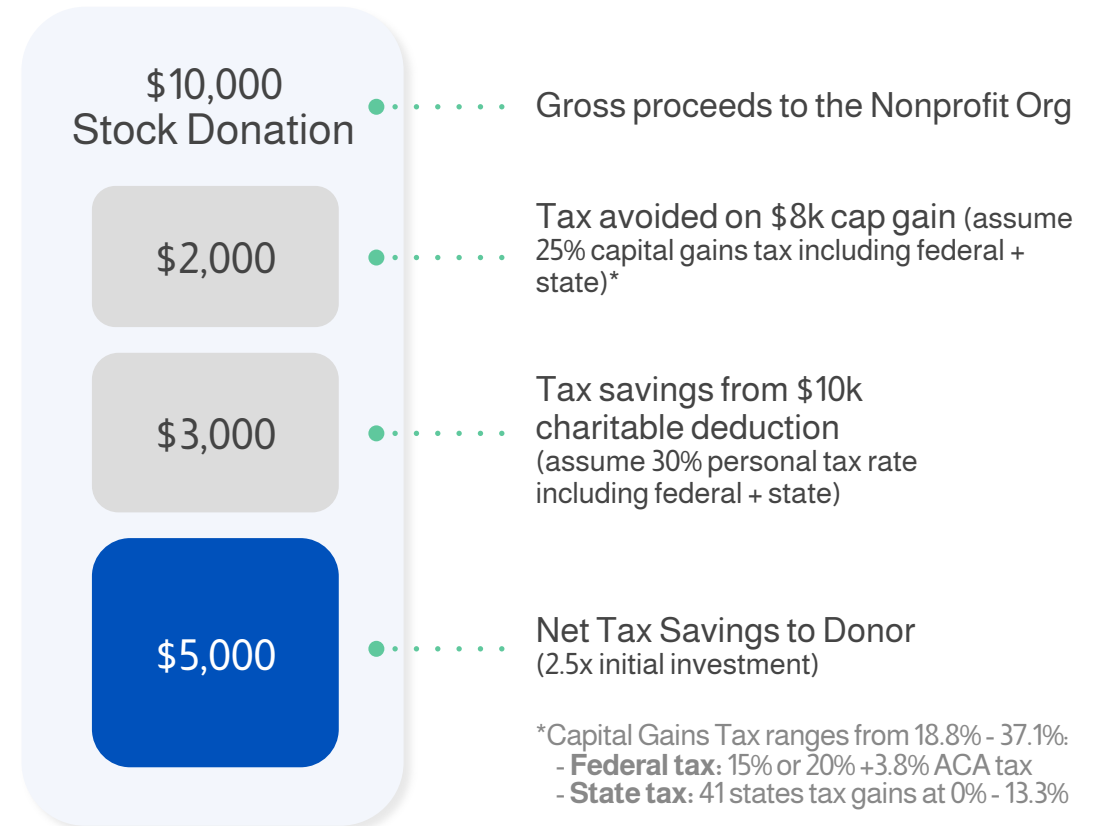
Source: 2019 US Consensus

Stock Gifting Offers Huge Benefits

Example: Save \$5k in taxes on a \$10k stock gift
(assume \$2,000 cost basis)

Savings stack up when donors give stock

- Avoid capital gains tax
- Deduct market value of the stock
- NPO receives a larger pre-tax gift



The opportunity: \$100 billion in funding

Market Opportunity

60mm Potential stock donors
(investor universe)

\$1,660 Expected stock donation
per investor*

\$100 billion annual giving

Adoption is growing

- Boomers entering giving cycle
- Influx of social-conscious investors
- Growing awareness among nonprofits

As stock gifts go, so does overall funding



When the share of stock gifts grows by more than 10%, total Contributions grow 22%

When the share of stock gifts fall by 10%, total Contributions fall 13%



*Texas Tech University study led by Dr. Russell James, J.D., Ph.D., CFP® and reporting on data from one million NPO tax returns from 2010 - 2017.

The Problem: Stock gifting has been largely unutilized



< 1% of nonprofits receive stock

- Only largest nonprofits have a brokerage
- Few are comfortable explaining to donors
- Manual processing doesn't scale

The good news: **this problem has been solved**

Stock gifting is now accessible and easy for all



- We provide the content to educate your donors
- We can convert stock gifts to cash for you
- We can do the reconciling and acknowledgements for you

Reconciliation and acknowledgement made easy



Most NPOs can handle a few stock gifts



Few can handle dozens (or hundreds) of donations

Challenges

- Donor info does not accompany stock
- Reconciling multiple gifts of same stock
- Manually intensive, hard to scale
- Often results in bad donor experience

Solutions

- ❖ Email notifications to donor and NPO
- ❖ Dashboard reporting and statements
- ❖ Convert stock to cash and manage reconciliations and receipts

Benefits

- ✓ Fast and efficient reporting
- ✓ Happier donors (transparency and timely acknowledgement)
- ✓ Removes barrier to scaling

Dashboard reporting

Track status of donations, manage pages, organize info

The screenshot shows the 'Donate Stock' dashboard. On the left is a blue sidebar with navigation links: Dashboard, View Nonprofit Page, Edit Nonprofit Page, Brokerage Info, Payment Info, Organization Contacts, Marketing Assets, Account Settings, and Sign Out. The main content area is titled 'Donations' and includes filters for 'All (8 donations)', 'Not Received (3)', 'Past Due (1)', 'Pending (2)', and 'Received (2)'. There are search and filter-by-date-range boxes with 'Apply' and 'Reset' buttons. A table displays 8 donation records with columns for ID, Submitted, Approx. Value, Securities, Donor, Broker, Status, and Action. A modal 'Donation received?' is open over the row with ID 172, showing 'Yes' and 'No' options. A user profile icon is in the top right.

ID	Submitted	Approx. Value	Securities	Donor	Broker	Status	Action
175	2020-12-21	\$14.25	1×apa	Rocky Balboa	Steve's Superawesome Bank 2356	Not Received	⋮
181	2021-01-11	\$1,306.62	1×SHOP, 1×AAPL	Joseph Yusufov	Charles Schwab 1234	Not Received	⋮
229	2021-02-09	\$136.01	1×AAPL	Joseph Yusufov	BBVA 0987	Not Received	⋮
172	2020-12-21	\$1,250.20	10×AAPL	Leonard Nimoy	Charles Schwab 5678	Not Received	⋮
176	2020-12-22	\$3,202.84	1×AMZN	Rocky Balboa	Steve's Superawesome Bank 2	Not Received	⋮
189	2021-01-15	\$1,297.61	1×AAPL, 1×SHOP	Joseph Yusufov	Vanguard 1090	Pending	⋮
205	2021-01-18	\$2,123.77	1×AAPL, 1×SHOP, 1×TSLA	Joseph Yusufov	WellsTrade 0980	Received	⋮
246	2021-02-12	\$2,406.98	1×AAPL, 1×TSLA, 1×SHOP	Joseph Yusufov	Interactive Brokers 7878	Received	⋮

View status of each donation

Mark as “Received” (donor will be emailed)

All your marketing assets in one place

Marketing Assets

Your DonateStock button:

Here's the code to your button. You can paste it as-is into your website, and clicking it will take your donors to your new DonateStock page.

```
<a href="https://donatestock.com/dsc" title="donate stock to Donatestock Charitable Inc."></a>
```

[Copy to Clipboard](#)

Launch Campaign [download the launch campaign marketing playbook PDF](#)

Here's everything you need to begin educating your donors about your new stock gifting program. If you have any questions on how to use these materials, don't hesitate to reach out to our customer success team.

- Email announcements
- Website Content
- Articles of Interest
- Social media posts
- DonateStock Buttons (PNG format for email & web)
- DonateStock Buttons (SVG vector format for web & print)
- Icons (PNG format for email & web)
- Images for Email Templates

Internal email announcement (to Board Members)

Subject: A New Way to Give: Put Stock in Something That Matters

Email Body: Dear Board Members,

We are thrilled to announce our partnership with [DonateStock](#), a cause-based company seeking to transform charitable giving by making stock donations fast, easy, and secure.

Donating stock used to be an intimidating process — for both donors and organizations like ours. But now, in a matter of minutes, you can save on taxes by donating stock directly to our cause. Donating appreciated stock is fast, safe and free, and it enables donors to avoid capital gains tax while earning a bigger tax deduction.

Stock represents a large untapped source of funding and Donatestock provides the notifications, reporting and tools we need to make the most of this opportunity.

How it Works

- 1 Donor selects Nonprofit and submits online donation form
- 2 DonateStock sends form to Donor's broker and notifies Donor and Nonprofit
- 3 Donor's broker transfers stock to the account belonging to Nonprofit or DonateStock Charitable*
- 4 Stock is received, reconciled, converted to cash and distributed to Nonprofit
- 5 Donor is notified the stock was received and is sent a receipt for the gift

[DonateStock page to learn more.](#)

Donor education made simple

- Stock gifting playbooks, copy, assets and campaigns
- Everything nonprofits need to engage their board, donors and the public

DonateStock
Sponsored · 🌐

Reduce your tax bill while making a huge impact on a non-profit close to your heart. #DonateStock #taxsmartplay

DONATESTOCK.COM
Put Stock In Something That Matters

Like Comment Share

POINTS OF LIGHT

SUPPORT OUR WORK

When you give to Points of Light, you support the vision of millions of individuals and organizations across the globe helping to solve society's greatest challenges through volunteer service.

Give Amount Donate

OTHER WAYS TO GIVE

Your gift, whether big or small, helps us amplify the impact of volunteer service in communities around the world.

- DONATE MONTHLY**
Your recurring gift to Points of Light ensures we can continue to grow a global culture of volunteerism. Visit our donation page to make a gift.
- STOCK GIFTS**
Consider utilizing your stock or mutual fund for your charitable giving. With our partnership with DonateStock, you can make your stock gift quickly and hassle-free by completing your form online.

MHA
Mental Health America of Greater Houston

Donate Now Get Help

MENTAL HEALTH SCREENINGS

ABOUT US PROGRAMS AND SERVICES TRAINING AND EDUCATION MEDIA
MENTAL HEALTH RESOURCES GET INVOLVED

GIVE STOCK

Did you know that when you donate stock, you avoid the tax on the gain while deducting 100% of the value of the contribution? When you give stock, you may earn 2-3x the tax savings vs. donating cash. It's a win-win for you and us. And now it's fast, safe and easy to do.

MHA of Greater Houston has partnered with DonateStock.com to enable our supporters to make stock donations in 10 minutes or less. Our DonateStock page www.donatestock.com/mhahouston enables you to donate stock from your brokerage directly to our account through a secure portal, making the gifting process fast, safe and easy.

So remember, charitable giving doesn't always mean cash. By giving stock, your support will have even greater impact - without denting your pocketbook. Give smart and save more by putting stock in something that matters.

Click here to visit our DonateStock page

Donate Stock

Donate Stock

WHY DONATE STOCK FOR DONORS FOR NONPROFITS FIND A NONPROFIT SIGN IN GET STARTED

Play Tax Day the Smart Way

Maximize Tax Savings!

Donate Stock Donate Cash

It's that time of year again! We're nearing the deadline to pay Uncle Sam for last year's successes and starting to strategize how to give him a little less of the pie next year!

- Were you surprised by the taxes owed for your Capital Gains?
- Did you know you have options for how you pay these taxes?

With Tax Day in mind, Donate Stock is partnering with some of your favorite charitable organizations to bring you useful information about the tax advantages of donating stock. This time next year could look very different for you, and for the people impacted by your charitable plays this year. Follow DonateStock on social and check out our blog to learn more about making your own Tax Day smart plays!

Donate to:

United Way

United Way of San Antonio and Bexar County

Donate Now

ALTSO
Put Stock in Something That Matters
To: Steve Latham,
Reply-To: info@altso.org

December 23, 2020 at 11:04 AM

This message is from a mailing list. Unsubscribe

ALTSO
A 501(c)(3) ORGANIZATION

2-3x higher!

Donate Stock Donate Cash

Stock offers 2-3x higher tax savings!

We are excited to announce a new way for you to make an impact while maximizing tax benefits when you support our **CoolKids**.

Keep more money in your pocket with every donation - when you donate stock to ALTSO, a 501(c)(3), you avoid capital gains tax while deducting 100% of the value of the contribution. Now is the perfect time to lock in up to 3x the tax savings vs. donating cash.

Our partners at DonateStock.com are generously waiving their fee for us so 100% of your stock donation goes to support our mission! Quickly and easily donate stock from your brokerage, and learn about the incredible tax benefits of donating stock to help others, by visiting our [DonateStock](http://DonateStock.com) page.

This year, give life-changing orthopedic care to our CoolKids, while maximizing your tax benefits.

Donate Stock

Case Study: World Central Kitchen



The Challenge

- WCK received global media coverage in its efforts to feed millions in Ukraine and Eastern Europe
- With minimal administrative resources, there was no way to:
 - 1) support the flood of requests for brokerage info, and
 - 2) manually process, reconcile and acknowledge stock gifts

The Solution

- WCK directs all inquiries to their DonateStock page <https://donatestock.com/world-central-kitchen-incorporated>
- On WCK's behalf we support donors and financial advisors, initiate and reconcile gifts, convert stock to cash and send acknowledge letters.
- **In Q1 2022, we processed millions in stock gifts for WCK**

"DonateStock has taken the heavy lifting out of stock donations for me and for our donors. People don't realize the investigative work that goes into reconciling stock donations for a nonprofit - just having a name next to a ticker symbol in our DonateStock dashboard saves me hours of time. Not to mention the ability for donors to give up until the last day of the year! Thankfully, DonateStock eliminates the need to reach a broker. Their platform has made my life easier." - **Gail Hatch, World Central Kitchen**



Donate Stock

WCK gratefully receives gifts of stocks and appreciated securities through Donate Stock, a social impact venture that streamlines the donation process.

Donate Stock

World Central Kitchen

Wherever there is a fight so that hungry people may eat, we will be there.

Founded in 2010 by Chef José Andrés, WCK uses the power of food to nourish communities and strengthen economies in times of crisis and beyond. WCK has created a new model for disaster response through its work helping devastated communities recover and establish resilient food systems.

WCK has served more than 50 million fresh meals to people impacted by natural disasters and other crises around the world in countries including The Bahamas, Indonesia, Lebanon, Mozambique, Venezuela, and the United States. WCK's Resilience Programs in the Caribbean and Central America have trained hundreds of chefs and school cooks, advanced clean cooking practices, and awarded grants to farms, fisheries and small food businesses while also providing training and networking opportunities.

Category: Human Services

Cause: Multipurpose Human Service Organizations

Rated 100/100 by CharityNavigator

You can help World Central Kitchen fund its mission while avoiding taxes by donating stock directly to them in minutes!



Donate Now

♥ Add to favorites

<https://wck.org/donations@wck.org>
202-844-6330

EIN: 273521132

655 NEW YORK AVE NW 6TH FLOOR
WASHINGTON, DC 20001-5554
United States



A few testimonials

“DonateStock made what is typically a difficult process incredibly easy. In a few minutes, I was able to donate to multiple causes near and dear to my heart. I plan on using this platform for all future donations.”

- **Karen Simpson (7 donations)**

“I previously donated stock by submitting my own brokerage forms and sometimes spent hours on the phone trying to get shares transferred. DonateStock handled everything for me. It was a great experience.”

- **Brandon Tuck (repeat donor)**

“DonateStock has taken the heavy lifting out of stock donations for me and for our donors. People don't realize the investigative work that goes into reconciling stock donations for a nonprofit - our DonateStock dashboard saves me hours of time. Not to mention the ability for donors to give up until the last day of the year! Thankfully, DonateStock eliminates the need to reach a broker. Their platform has made my life easier.

I hope to convert all of our stock donors.” **Gail Hatch**



“DonateStock has made our lives so much easier. I love that we can go to our dashboard and keep track of everything. January was an extremely busy and overwhelming month for us and even though we get a notification email every time a donation is made, it is easy to lose track - I love that we can rely on our dashboard to keep track of everything.” **Peggy Still Johnson**

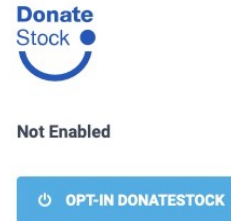


8 steps to stock gifting success

1. 💡 Get informed: download the Ultimate Guide to Stock Gifting
<https://donatestock.com/blog/download-the-ultimate-stock-gifting-guide-for-nonprofits>
2. 😊 Engage your board and team - make stock gifting a key part of your fundraising program
3. 🔦 Make stock gifting prominent on “Donate Now” “Ways to Give” pages
4. 💰 Ask your board to make a stock gift
5. 👁️ Make it newsworthy: issue a press release that you can receive tax-advantaged stock gifts.
6. 🎓 Educate your donors on your site and at events
7. ✍️ Integrate stock gifting language in all communications: newsletters, brochures, email, donation requests
8. 📣 Make it social: include stock gifting in your social media posts

How to get started

1. Visit the BetterUnite customer portal and enable DonateStock →
2. Find or create your page at <https://donatestock.com/user/register/nonprofit>
3. Complete your organization profile
4. Execute terms of service
5. Implement our easy button
6. Start soliciting stock gifts



Accept Stock Donations, powered by **DonateStock**

- ☆ DonateStock empowers you to accept and streamline charitable stock gifts to increase your revenue.
- ☆ By activating this option your campaigns can offer donors a new way to give. As stock offers additional tax benefits to donors, it is becoming an increasingly popular way to donate.
- ☆ Stock gifts will be converted to cash and sent to you via ACH – no brokerage required.

Just use your EIN to claim register and integrate your stock gifting page in minutes.

What happens when I "Enable" DonateStock?

Once you enable DonateStock on this page, a new option will be available on your campaign pages that allows donors to make stock donations. Donors will be able to use the link on the campaign page to make stock donations to your organization.

How does a donor make a stock donation?

Donors initiate donations from the Donate Stock link on your BetterUnite page, which directs them to your nonprofit page on DonateStock. The donor then registers and submits instructions for the specific securities from their account to that of the receiving organization. DonateStock then compiles the information and submits the instructions - which include the nonprofit's contact and brokerage account information - to the donor's brokerage. The donor's broker will then transfer the shares to the receiving account.

The donor and the receiving nonprofit will each receive notifications when the stock gift is initiated and received.

What if my organization is not listed in DonateStock?

By establishing the integration with DonateStock through BetterUnite, you will be prompted to create your DonateStock home page. You will need an EIN specific to your organization. If you are a nonprofit working under an umbrella EIN with another organization, you will need to reach out to DonateStock support [HERE](#).

How long does it take to get stock donations?

It may take several business days for the donor's broker to process and execute the transfer to the receiving organization.

Can I see stock donations and details?

Donors and organizations can view their DonateStock dashboard and generate reports showing the details for each donation.

Thank You



Put stock in something that matters



@donatestock