



FAQs: Giving Stock to Helpers Community

Q: Can I donate stock to Helpers Community?

A: Absolutely. We gratefully accept gifts of publicly traded stocks, ETFs, and mutual fund shares. These gifts support our programs while offering potential tax advantages for you.

Q: What are the benefits of donating stock instead of cash?

A: When you donate appreciated securities that you've held for more than a year:

- You may avoid paying capital gains tax, and
- You can deduct the full fair market value of the stock (up to IRS limits)

This can be a smart way to give more at less cost to you.

Q: How do I make a gift of stock?

A: It's simple:

- 1.) Ask your financial advisor or brokerage to transfer the stock directly to our account (not to you first).
- 2.) Provide us with:
 - The name of the stock
 - Number of shares
 - Approximate date of transfer (and retain a record of the transaction from your broker)
 - Your contact information

Helpers Community Brokerage Information:

Receiving Firm: [Insert Firm]

Account Name: Helpers Community

Account Number: [Insert Number]

DTC Number: [Insert DTC]

(We'll provide this in full when you're ready to proceed.)





Q: How will my gift be acknowledged?

A: You'll receive a written acknowledgment with the name and number of shares donated and the date we received them. For IRS purposes, your deduction is based on the average of the high and low price on the day the gift is received into our account.

Q: Can I designate my gift to a specific program?

A: Yes! You can direct your gift toward:

- Housing and supported living
- Job training and employment
- Arts programming through Helpers Artisan Boutique

Or let us use it where it's needed most.

Q: Are there other non-cash ways I can give?

A: Yes! We also accept:

- Qualified Charitable Distributions (QCDs) from your IRA
- Gifts of real estate or property (reviewed case-by-case)
- Bequests and other legacy gifts

Learn more at www.helperssf.org or contact us directly.

Q: Who can I talk to about my gift?

A: Please contact: Kate Fitzsimmons kate@helperssf.org | (415) 686-1036

We're here to help make your giving easy and meaningful.