

Gift of Securities

CONSIDER A TAX-SAVING GIFT OF SECURITIES TO VENTURE ACADEMY

Giving long-term (more than 1 year) appreciated stock or mutual fund / ETF shares offers two important tax benefits:

1. You avoid paying capital gains tax on the increase in the value of your shares.
2. You receive an income tax deduction equal to the full fair-market value of the shares on the date of the gift.

Deductions of long-term capital gain property to public charities such as Venture Academy are limited to 30 percent of your adjusted gross income. However, any excess can be carried forward for five years and used to offset income in future years.

AN EXAMPLE

If you bought stock many years ago for \$1,000 and it is now worth \$10,000, an outright gift of that stock to Venture Academy would result in a charitable deduction of \$10,000. In addition, you would permanently avoid capital gains taxes on the \$9,000 of appreciation. Capital gains taxes on the \$9,000 of appreciation would be permanently avoided as Venture Academy is a non-taxable entity and it would liquidate the shares after the gift has been received.

IMPORTANT

Before transferring your gift, please contact Brian Sullivan, Head of School, and provide the following information:

1. Your name
2. Broker's name (individual and company) and telephone number
3. Description of security issue and number of shares
4. Gift designation (Venture Academy)

It is important that you contact the Venture Academy office before donating securities so that we can properly credit your gift.

STOCK DELIVERY INSTRUCTIONS

Firm Name	Pershing, LLC
DTC Number	0443
Country	United States
Account Name	Venture Academy Inc.
Account Number	Q28157552

For assistance contact:

Wendy Yohnk, FPQP™, Senior Client Associate

715.858.7702

wendy.yohnk@orgelwealth.com

Please ask your stockbroker or custodian to provide the donor's name at the time of the transfer.

Thank you for your generosity!

We will contact you as soon as we receive the transfer.

MORE INFORMATION

For more information on Ways to Give please contact:

Brian Sullivan, Head of School

763.315.7292

brian.sullivan@ventureacademy.org

Venture Academy

989 122nd Street

Chippewa Falls, WI 54729

715.972.0032

info@ventureacademy.org

EIN 91-1602819

