Gifts of stock or mutual funds

Donating appreciated securities offers a meaningful way to support organizations you care about, such as Navy-Marine Corps Relief Society, while potentially providing financial benefits to you.

What is a gift of stock or mutual funds?

Gifts of stock or mutual funds involve transferring ownership of securities directly to a qualified nonprofit like Navy-Marine Corps Relief Society. These gifts are typically made using publicly traded stocks or mutual funds that have appreciated in value over time.

What are the benefits?

Donating appreciated stock or mutual funds may provide several important financial and charitable benefits.

- By contributing appreciated assets directly to a nonprofit, such as Navy-Marine Corps Relief Society, donors may avoid paying capital gains tax on the increase in value of those securities.
- In addition, individuals who have held the assets for more than one year may be eligible to receive a charitable income tax deduction based on the full fair market value of the donation.
- Giving through securities can also allow donors to maximize their charitable impact, often enabling them to contribute more than they might through a cash gift alone.
- Most importantly, these generous contributions help support mission-critical programs and services.

How does it work?

- You transfer shares directly from your brokerage account to NMCRS.
- The value of your gift is based on the average of the high and low trading price on the date of transfer.
- NMCRS sells the securities and uses the proceeds to support our programs.

> **During one of the most difficult times for our family, NMCRS provided more than just financial support—they gave us comfort, relief, and peace of mind. Their kindness and encouragement reminded us that we weren't alone and helped us believe we could make it through even the toughest circumstances.**
>
> *– Anonymous*

Donating a gift of stock or mutual funds to NMCRS

Navy-Marine Corps Relief Society is powered by compassion. Making a gift of stock or mutual funds is an impactful way to support Sailors, Marines, and their families.

Steps to donate stock and mutual funds

✓	Request information on how to transfer stock or mutual funds	Congratulations, you’ve already completed this step.
	Initiate the transfer	Contact your broker or financial institution and request a direct transfer of securities to NMCRS.
	Provide NMCRS information to your brokerage firm	Organization: Navy-Marine Corps Relief Society EIN: 53-0204618 DTC: 2039 SE Private Trust Company FFC Truist Bank Account Name: NMCRS Account Number: 7025127
	Notify NMCRS of incoming transfer	Please notify us of your gift so we may properly acknowledge receipt of your thoughtful contribution. Include: • Donor name • Name of stock/mutual fund • Number of shares • Expected transfer date
Important notes: To qualify for a tax deduction in a given year, the transfer must be completed by December 31. Mutual fund transfers may take longer and may require additional paperwork.		

Support Navy-Marine Corps Relief Society

Driven by a deep commitment to service, the Relief Society provides a wide range of support from financial assistance to education and community care, ensuring no one faces hardship alone. Whether it’s covering unexpected expenses, navigating an emergency, welcoming a new baby, or planning for the future, we are a trusted source of comfort, stability, and relief. Every dollar received has a significant impact for NMCRS.

By contributing to NMCRS, you give more than financial assistance—you provide peace of mind. Your generosity helps families stay resilient during hardships, strengthens the readiness of our forces, and ensures a legacy of care continues for generations to come.

We understand that charitable giving is a personal decision, and we are grateful for your support.
Please contact the NMCRS Development team at **giving@nmcrs.org** or **800-654-8364** to discuss the giving option that best meets your needs.

NMCRS (EIN 53-0204618) is a 501(c)(3) nonprofit organization located at 875 N Randolph St., Suite 225, Arlington, VA 22203.

NMCRS does not provide tax or legal advice; this information is intended as general guidance only. NMCRS does not receive any government funding; we operate entirely on private donations.