

## 1 Giving Through Appreciated Stock

Would you like to make a meaningful contribution to Foundation Academy while maximizing your tax benefits? Do you have stocks, bonds, mutual funds, ETFs, or similar items that have grown in value? By donating appreciated assets, you can support our mission while potentially reducing your tax liability.

Giving appreciated assets is a simple, tax-savvy way to make a big impact. When you donate shares of stock, bonds, mutual funds, ETFs, or similar assets directly to Foundation Academy through our brokerage account, you can avoid paying capital gains taxes on the increase in value of your investment and may qualify for a charitable deduction based on the asset's fair market value. This allows you to give more generously, with greater tax efficiency.

### Why Consider a Stock Gift?

Donating assets, especially appreciated assets, is one of the most tax-efficient ways to give. By donating assets directly, you avoid capital gains taxes, allowing your full contribution to make a bigger impact on our school community.

- **Greater Impact, Lower Cost:** Donate the appreciated stock, bonds, mutual funds, ETFs, or similar assets directly rather than selling them first. This can reduce your capital gains taxes, allowing you to give more without increasing your after-tax cost.
- **Significant Tax Advantages:** Avoiding capital gains taxes can increase your tax benefits, potentially qualifying you for a deduction of the full market value of the asset at the time of the gift.
- **Simplicity in Giving:** We've made the process simple! By working with our brokerage account, you can transfer your appreciated stock, bonds, mutual funds, ETFs, or similar assets seamlessly.

### How to Give Stock to Foundation Academy

If you're ready to make an impactful gift, reach out to our Chief Development Officer, Liefke Meyers, at 407-496-3904 or [liefke.meyers@foundationacademy.net](mailto:liefke.meyers@foundationacademy.net). We'll provide our brokerage details and guide you through the quick and easy steps to complete your transfer.

Together, let's invest in the future of Foundation Academy and make a lasting impact on our community.

*The information provided is for general educational purposes and is not intended to be tax advice. Consult your tax professional or financial advisor for information regarding your specific situation.*

## 2 Giving Through Qualified Charitable Distribution

### What is a Qualified Charitable Distribution (QCD)?

A Qualified Charitable Distribution allows individuals aged 70½ or older to donate up to \$100,000 per year (up to \$200,000 for a qualifying married couple) directly from their IRAs to a qualifying charity, such as Foundation Academy, without incurring income tax on the withdrawal. Making a QCD is a tax-efficient way to support causes you care about while fulfilling Required Minimum Distributions (RMD) from your IRA.

### Benefits of Giving Through a QCD

- **Tax Savings:** By donating directly from your IRA, you may reduce your taxable income and possibly lower your tax liability.
- **Fulfill RMD Requirements:** If you're required to take a Required Minimum Distribution, a Qualified Charitable Distribution counts toward your RMD without being added to your taxable income.
- **Make a Difference:** Your donation supports Foundation Academy's mission and ensures future generations have access to a high-quality Christian education.

### How to Make a Qualified Charitable Distribution

1. **Contact Your IRA Administrator:** Inform your administrator that you'd like to make a Qualified Charitable Distribution to Foundation Academy.
2. **Provide Foundation Academy's Information:**
  - **Legal Name:** Foundation Academy
  - **EIN:** 65-1067210
  - **Address:** 15304 Tilden Rd, Winter Garden, FL 34787
3. **Let Us Know:** Please notify us of your generous gift so we can acknowledge your support and direct it to the area that matters most to you.

### Ready to Give or Want More Information?

If you're interested in making a Qualified Charitable Distribution or have questions, we're here to help. Please contact Liefke Meyers, Chief Development Officer, at 407-496-3904 or [liefke.meyers@foundationacademy.net](mailto:liefke.meyers@foundationacademy.net).

Thank you for investing in the future of Foundation Academy and empowering students to grow in their faith and academic journeys. Together, we are building a brighter future for our students and our community.

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