The Greater Cincinnati Foundation (GCF) helps people make the most of their giving to build a better community. We can help business owners like you support the causes you care about most while making an impact on your bottom line and creating a family legacy.

Closely Held Stock

Gifts of closely held stock provide two tax benefits: a charitable deduction for the full fair market value of the property and the avoidance of the capital gains tax that would have been paid had the stock been sold.

The Benefits:

- Increase support for your favorite philanthropic interests
- Maximize your income tax deduction at 30% of adjusted gross income (AGI)
- Avoid or reduce capital gains
- Avoid or reduce future estate tax
- Access our team of experts to make gifts of complex assets
- Create personalized charitable giving plans, including family philanthropy and legacy planning
- Access GCF’s community knowledge

“Setting up the GCF fund and using Paycor shares as one of the donations was meaningful. It gave a charitable purpose to the business and further connected the business to the community. With GCF, you can rest assured that your funds will be able to make the greatest impact possible.”

Bob Coughlin
CEO, Paycor
As a person who owns a substantial part of a privately held business, donating privately held stock to individual charities is complicated. Setting up a fund at The Greater Cincinnati Foundation I am able to centralize my efforts allowing me to save time and energy. I chose GCF as that entity because they have the infrastructure and sophistication to be able to accept and understand the valuation of privately held stock.”

“The Greater Cincinnati Foundation helps people achieve their charitable goals, supporting nonprofit organizations, and creating lasting good work in the region. We provide a simple, powerful, and highly personal approach to giving and offer a variety of tools to meet specific individual needs.

For more information, consult with your professional advisor or have a discussion with an experienced GCF staff member to determine your priorities and evaluate your options.

513-241-2880 | info@gcfdn.org | www.gcfdn.org

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**Gifts of closely held C corporations, S corporations, partnership interests and limited liability companies must be evaluated on a case-by-case basis. All such gifts must be valued by a qualified appraiser (to substantiate the tax deduction) prior to transfer.**

**Required by the Pension Protection Act of 2006. However it may be possible to apply for an extension.**