

# *Legacy and Planned Giving with The BHI Senior Living Foundation*

## **Donating Stock**

A gift of stock is a powerful way to support the BHI Foundation while maximizing your charitable impact. By donating appreciated stock directly to the BHI Senior Living Foundation, you can make a meaningful difference in the lives of older adults while also potentially reducing your tax burden. When you donate stock instead of selling it, you may be able to avoid capital gains taxes and receive a charitable deduction for the full fair market value of the stock at the time of donation.

Benefits of Donating Stock:

- Maximize your gift's impact by giving appreciated securities.
- Potentially avoid capital gains taxes on appreciated stock.
- Receive a charitable deduction for the fair market value of the stock.

### **How to Donate Stock to the BHI Foundation**

Transferring stock is simple and can be done through your broker or financial advisor. When making a charitable contribution, please use the following legal name and tax identification information for the BHI Senior Living Foundation:

BHI Senior Living Foundation  
8330 Allison Pointe Trail  
Indianapolis, IN 46250

Tax ID Number: 26-0262903

BHI Foundation Inc. is a 509(a)(3) supporting organization. All gifts made to the Foundation are tax-deductible in accordance with the tax laws of the United States of America and the State of Indiana.



For more information or to contribute to the BHI Foundation, please contact:

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