



Donating Securities

Start Now to Ensure Year-End Benefits

Donating appreciated stock and mutual fund shares that you have held for more than a year can result in significant tax benefits. You receive an itemized income tax deduction for the full fair market value of the shares given.

By transferring the shares to Academy Prep Center of Tampa, rather than selling them first and donating the proceeds, you avoid paying capital gains tax. This allows us to benefit from your generous gift. Please consult your tax advisor regarding your specific legal and tax situation. This information is not considered legal or tax advice.

Remember, start early to make sure the transfer process is completed by year's end.

If you have already made your gift this year, thank you!

To make a gift of securities, simply contact Maggie McClelland, Director of Development at 813-248-5600 ext. 1138 or mmcclelland@academyprep.org

Acknowledgement will include pertinent information about the donation, including the dates of the donation, description of the stocks, and the number of shares. The acknowledgement will not include a valuation of the donation. It is the responsibility of the donor to establish the value of the donation for his/her tax purposes, per IRS regulation.

