Canyon Heights Academy • TAX-EFFICIENT CHARITABLE IMPACT

Donate Appreciated Equity, Multiply Student Impact

In addition to cash donations, we welcome transferring vested RSUs or appreciated stock directly to our school

Maximizes your tax savings while delivering 100% of the market value to our programs

Bypass Paying Capital Gains Tax

Eliminate up to 33%+ tax via Federal and California capital gains tax on appreciated RSUs / appreciated stock.

Tax Returns – Full Market Value Itemized Deduction

Claim an **itemized income tax deduction** in your tax return for the **full current fair market value** of the stock.

100% Direct School Benefit

Our 501(c)(3) pays zero tax on receipt, putting every dollar into the school.

A Win-Win for Parents and Students

Donating $10k in stock provides $10k to our school while costing you significantly less out-of-pocket than cash.

- Registered Name on Schwab Account: Canyon Heights Academy
- Receiving Brokerage Name: Charles Schwab & Co., Inc.
- CHA's Schwab 8 digit account number: 9772- 9719
- Schwab's DTC Number: 0164
- Contact Name for the Transfer: Melissa Ma

Why Donate Appreciated Stock Instead of Cash?

Illustrative example: Donate $100 cash gift Vs. Donate $100 stock that has appreciated to $350

1. Give $100 Cash

School receives donation	$100
Cost basis of asset (cash)	$100

Impact to giver

Illustrative donation tax savings ($100 @ 24%)	$24
Capital gain avoided	$0

2. Donate $100 Stock now worth $350

School receives donation	$350
Cost basis of asset (stock)	$100

Impact to giver

Illustrative donation tax savings ($350 @ 24%)	$84
Capital gain tax avoided ($250 @ 15%)	$37.50

Illustrative only: assumes stock held >1 year, 24% marginal ordinary income tax rate, 15% long-term capital gains rate, donor itemizes deductions, and no deduction limitations. ***Actual results vary. This is not tax advice. Always consult with a tax professional for actual tax results in your tax situation.***