

Dear Supporter,

We know that your decision to support Scouting at Mecklenburg County Council comes from the heart. We hope you find the stories and information we provide throughout the year to be inspiring and helpful!

As we approach the end of 2025, we want to bring your attention to some crucial deadlines. For those considering donating non-cash assets, such as stocks, bonds, or retirement fund assets, we strongly recommend initiating the transfer process this week. This will ensure your gift is received and processed within the current calendar year.

Investment firms, donor advised fund managers, and others can take two to four weeks or longer to fully process and issue charitable contributions from their clients.

Testimony Time! Watch lifelong Scouter Ron Adolphi talk about his own approach to giving back using qualified charitable distributions-

<https://scoutingamericalegacy.org/?pageID=3&storyNum=23>

Consider These Gift Options

Here are the top three non-cash giving strategies and how they work:

IRAs

If you are 70½ or older, you can give any amount up to \$108,000 (or \$216,000 per couple) per year from your IRA to support nonprofits. You will not pay income taxes on the amount transferred, thereby potentially reducing your overall income tax exposure for the year. If you are required to take minimum distributions, you can use this transfer to satisfy part or all of that requirement.

To Do: If you have check-writing features on your IRA, your check must clear your account by Dec. 31 to count toward your required minimum distribution for the calendar year. You can also contact your account manager today to request the transfer and provide them with our legal name of **Mecklenburg County Council, BSA**, address of **1410 E. 7th Street, Charlotte, NC 28204**. When ready call us for the council tax ID number at 704.342.9328.

Appreciated Securities (Stock, Bonds, etc.)

Avoid paying taxes on the appreciated value of your publicly held securities and qualify for an income tax charitable deduction based on today's market value when you itemize.

To Do: Contact your investment manager today to request the transfer and provide them with our legal name of **Mecklenburg County Council, BSA**, address of **1410 E. 7th Street, Charlotte, NC 28204**. When ready call us for the council tax ID number at 704.342.9328.

Donor Advised Funds

Now is an ideal time to recommend a grant from your DAF to support our Council, or to establish an annual recurring grant. If you haven't yet created one, you can easily set up a Scouting DAF by contacting giftplanning@scouting.org or visit www.scoutingamericalegacy.org.

To Do: For pre-existing DAF holders, contact your DAF custodian and provide them with our legal name of **Mecklenburg County Council, BSA**, address of **1410 E. 7th Street, Charlotte, NC 28204**. When ready call us for the council tax ID number at 704.342.9328.

Let's Team Up

As we approach the end of the year, we're happy to help you choose the right giving strategy for you. Please feel free to visit us at www.mccscouting.org/giftplanning or contact us at 704.342.9328 or Daniel.holden@scouting.org for additional support.

Thanks for all you do for Scouting!

Yours in Scouting,

Daniel Holden | Director of Development

Disclaimer: Please note that the above communication is intended for educational purposes only and shall not be construed as providing specific tax, legal, or financial advice. Please consult your tax advisor, attorney, or plan administrator when naming a charitable beneficiary for your IRA.