

# Ukraine's Jewel: Turning a Treasured Asset Into Urgent Relief

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## Key Takeaways

**Situation:** Mitzi Perdue wanted to support humanitarian aid in Ukraine but faced nearly 24% capital gains tax if she sold her valuable emerald ring.

**Solution:** She contributed the ring to a donor-advised fund (DAF) powered by Ren, allowing the ring to be sold tax-free.

**Impact:** The full sale value went directly to humanitarian relief with no loss to taxes.



## Situation

In early 2022, as Russia invaded Ukraine, Mitzi Perdue felt compelled to act. She wanted her contribution to matter, and she wanted speed without complexity.

Her thoughts turned to an extraordinary asset: a rare emerald ring she had cherished for years. Selling it could translate into real support, but the traditional route came with a catch: a capital gains tax hit of nearly 24%, reducing the funds that would reach relief organizations.

For Mitzi, that wasn't acceptable. If she was going to give, she wanted every possible dollar to make an impact.

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### Solution

Working with her financial advisor, Mitzi explored a smarter approach. Together, they turned to Ren.

Instead of selling the ring herself, Mitzi contributed it directly to a donor-advised fund (DAF) powered by Ren. Ren handled everything—from asset intake to auction coordination. Because assets donated to a DAF can be sold without triggering capital gains taxes, the full value of the ring was preserved for charitable grantmaking.

No friction. No tax erosion. Maximum philanthropic leverage.



### Impact

The ring sold for a substantial amount, and 100% of the proceeds supported humanitarian relief in Ukraine.

A treasured heirloom became lifesaving aid. Compassion turned into meaningful, immediate impact.



#### **For advisors:**

Stories like Mitzi's provide a natural entry point for tax strategy conversations while positioning you as a trusted advisor who helps clients align their values with smart financial planning. Complex asset contributions through DAFs can strengthen multigenerational client relationships and differentiate your practice.

### **Have clients with appreciated assets or complex holdings they want to use for good?**

Let's talk about how a DAF can unlock significantly more impact while providing tax advantages your clients will value.

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