**Toolkit Asset #3: Teaser Email Template: Advisor → Client**

**How this may be used:** Plug-and-play email copy advisors can send to clients who may have appreciated assets, inviting them to discuss tax-smart giving strategies using a DAF. Designed to get the conversation started with minimal effort.

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**Purpose:**  
Help advisors open the door to a strategic conversation about using appreciated stock for charitable giving at year-end. Written to be copy-paste ready and editable for CRM or Outlook.

**SUBJECT LINE OPTIONS:**

* Reduce your taxes with a year-end giving strategy
* Let’s talk before December 31
* Thinking about donating stock? Let’s make it count for 2025
* A smart way to give before year-end
* Offset gains and give back before 12/31

**EMAIL BODY**

Hi [Client First Name],

As we approach year-end, I wanted to flag a planning strategy that could help you reduce your 2025 tax liability and support causes you care about, especially if you’re holding appreciated stock.

By donating shares *in-kind* to a donor-advised fund (DAF) before December 31, you can:

* Avoid capital gains taxes on the donated shares
* Take a charitable deduction for the full fair market value
* Support the causes you care about, on your own timeline
* Rebalance your portfolio more efficiently

I’ve attached a quick explainer with the details. If you’re planning any portfolio adjustments this year, it’s worth reviewing now. These gifts need to be completed by year-end for a current-year tax deduction.

If this sounds interesting, I’d be happy to walk you through how it might fit into your broader plan.

Best,  
[Name]  
[Signature or Contact Info]