

Choose the Gift Plan That Matches Your Goal

Your Gift	Bequest in Will	Revocable Living Trust	Outright Gift of Cash	Outright gift of appreciated assets	Outright Gift of Personal Property	Gift of Life Insurance	Gift of Retirement Assets	Gift of Real Estate	Gift of Retained Life Estate	Charitable Remainder Unitrust	Charitable Remainder Annuity Trust	Charitable Gift Annuity*	Charitable Lead Trust
Your Goal	Defer a gift until after your lifetime.	Make a revocable gift during your lifetime.	Make a quick and easy gift.	Avoid tax on capital gains.	Share your enjoyment of a collection of other items.	Make a large gift with little cost to yourself.	Avoid the twofold taxation on IRAs or other employee benefit plans.	Make a gift of an asset no longer needed and generate an income tax deduction.	Give your personal residence, vacation home or farm now, but continue to live there.	Create a hedge against inflation over the long term and supplement your retirement income.	Secure a fixed income and supplement your retirement funds.	Supplement income with steady payments that are partially tax-free.	Reduce gift and estate taxes on assets you pass to children or grandchildren.
How You Make the Gift	Name us in your will (designate a specific amount, a percentage, or a share of the residue.)	Name us the beneficiary assets in a living trust.	Simply write a check.	Contribute long-term appreciated stock or other securities.	Donate tangible personal property used for our tax-exempt function.	Contribute a life insurance policy you no longer need.	Name us as the beneficiary of the remainder of the assets after your lifetime.	Donate the property to us, or sell it to us at a bargain price.	Deed ownership of your home to us but retain occupancy.	Create a trust that pays a fixed percentage of trust's assets as revalued annually.	Create a charitable trust that pays you a set income annually.	Enter into a charitable gift annuity contract with us that pays a set amount for one or two lives.	Create a charitable trust that pays fixed or variable income to us for a specific period of years; principal is retained for heirs.
Your Benefits	<ul style="list-style-type: none"> • donation exempt from federal estate tax • control of asset for your lifetime 	<ul style="list-style-type: none"> • control of the trust for your lifetime • gift in trust exempt from federal estate tax 	<ul style="list-style-type: none"> • immediate income tax deduction • removes property from estate tax 	<ul style="list-style-type: none"> • immediate charitable deduction of full fair market value • avoidance of capital gains taxes 	<ul style="list-style-type: none"> • charitable deduction based on full fair market value 	<ul style="list-style-type: none"> • current income tax deduction • possible future deductions through gifts to pay policy premiums 	<ul style="list-style-type: none"> • make the gift from the most highly taxed assets, leaving more for family • avoids income and estate tax 	<ul style="list-style-type: none"> • immediate income tax deduction • reduction or elimination of capital gains tax 	<ul style="list-style-type: none"> • valuable charitable income tax deduction • lifetime use of residence 	<ul style="list-style-type: none"> • variable income for life • immediate income charitable deduction 	<ul style="list-style-type: none"> • fixed payments for life, often at a higher rate of return • immediate income tax deduction 	<ul style="list-style-type: none"> • current and future savings on income taxes • fixed payments for life 	<ul style="list-style-type: none"> • reduces your taxable estate • property kept by your family, often with reduced gift tax
Questions? Ideas? Call Us Today at 775.322.7073												* Not available in all states or from all organizations	