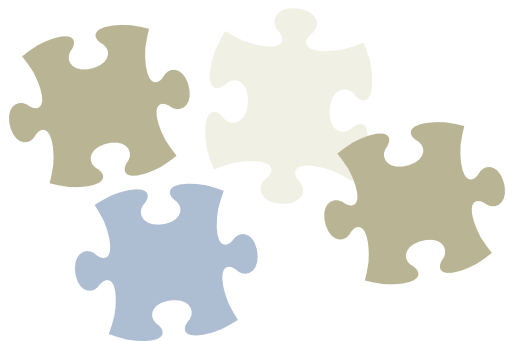


## Planned Giving Overview

The goal of planned giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are several ways you can make these planned gifts to charity and enjoy tax and income benefits.

The goal of this brochure is to provide you with an overview of planned giving options. If you have questions, please contact us, we look forward to helping you.



*I have reviewed your brochure on Planned Giving and:*

- I would like to speak with someone who can provide additional giving information.
- I would like to receive information on other charitable giving methods.

Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_

State/Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

E-mail \_\_\_\_\_

*(Please complete and return. All inquiries are treated with complete confidentiality.)*

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



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## Understanding Planned Giving



## Bequest

### YOUR GOAL

- Maintain control of your assets during life
- Make a gift to charity at your death

### HOW IT WORKS

You designate our organization as the beneficiary of your asset by will, trust or other instrument.

### YOUR BENEFITS

- Estate tax charitable deduction
- Life use and ownership of your property

## Charitable Gift Annuity (CGA)

### YOUR GOAL

- Receive fixed income for life
- Avoid capital gains tax on the sale of your appreciated property
- Enjoy the benefit of tax savings from a charitable deduction

### HOW IT WORKS

You transfer your cash or appreciated property to our organization in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.

### YOUR BENEFITS

- Charitable tax deduction
- Fixed income for life
- Partial bypass of capital gain
- Possible tax-free payments

## Charitable Remainder Trust (CRT)

### YOUR GOAL

- Transfer your appreciated property without paying capital gains tax
- Enjoy regular income for life or a term of years
- Receive the benefit of tax savings from a charitable deduction

### HOW IT WORKS

You transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax-free and provides you with income for life or a term of years.

### YOUR BENEFITS

- Charitable tax deduction
- Income for life or a term of years
- Possible income growth over time
- Avoidance of capital gains tax

## Charitable Lead Trust (CLT)

### YOUR GOAL

- Give cash or property to your family in the future
- Avoid substantial gift or estate tax

### HOW IT WORKS

You transfer your cash or property to fund a lead trust that makes a gift to us for a number of years. You receive a charitable deduction for the gift. Your family receives the remainder at substantial tax savings.

### YOUR BENEFITS

- Charitable tax deduction
- Lifetime use of property

## Life Estate Reserved

### YOUR GOAL

- Remain in your home for life.
- Receive a charitable income tax deduction

### HOW IT WORKS

You give your property to our organization but retain the right to use the property during your life.

### YOUR BENEFITS

- Charitable tax deduction
- Lifetime use of property

## Bargain Sale

### YOUR GOAL

- Transfer your property and receive cash or debt relief without paying substantial taxes

### HOW IT WORKS

We purchase your property for less than fair market value. You receive the cash and a charitable deduction for the difference between the market value and purchase price.

### YOUR BENEFITS

- Cash from sale
- Charitable tax deduction
- Partial bypass of capital gain

