

Elevator Pitches for Gift Planners

A Gift Through Will or Trust: Bequest

A designation in your will won't affect cash flow during your lifetime. It's easy to change if your situation changes.

Appreciated Securities

Did you know, giving stock can be more beneficial than giving cash?

Retirement Plans

There is no tax when your IRA is used as a gift to charity, but it is subject to double taxation if given to heirs. Consider leaving them more favorably-taxed assets.

Life Insurance

Just name the charity as policy beneficiary. You'll avoid potential estate taxes if you own the policy on your own life and make an extraordinary gift.

Real Estate

Make an extraordinary gift, transfer the burden and expense of managing the property, and remove a large asset from your taxable estate at the same time.

Gift Annuity

You can make a gift and receive guaranteed fixed payments for life. Payments may be much higher than your return on low-earning securities or CDs.

Pooled Income Fund

A pooled income fund works like a mutual fund by investing donations and paying income for life. And if you give stock, you pay no capital gains tax.

Unitrusts and Annuity Trusts

A great way to make a gift, receive payments, and defer or eliminate gains tax. It can be more beneficial than keeping an asset or selling it outright.

Bargain Sale

You can sell your property at a discount, deduct the difference, and receive a lump sum or installment payments.

Retained Life Estate

You can deed your home, farm or vacation house, save taxes with a current deduction, and still use the property for the rest of your life.

Lead Trust

You greatly reduce or avoid possible gift and estate tax on trust assets passing to family... if some trust income goes to charity for a few years.

CONVERSATION STARTER

If I could show you a way to redirect your taxes to help our mission, would you give me two minutes of your time?



Three versions available at PlannedGiving.com.