

# PLANNED GIVING MICRO WEBSITE for the Smaller Nonprofit

## Top Features At A Glance

Our Planned Giving Micro Website is perfect for the “smaller shop” that’s starting a new planned giving program, or expanding an existing program online.

- **BEQUEST CENTRIC.** Multiple links to bequest language, codicil download and bequest video.
- **FEATURED VIDEO.** “What Is Planned Giving?” description for donors. Explainer Videos. All gift plans made clear for donors.
- **ESSENTIAL GIFT PLANS.** Brief summary + Donor profile.
- **FAQS.** Questions donors ask.
- **GLOSSARY.** Common planned giving terms explained. Weekly Tip. Keeps your website fresh.
- **SEO OPTIMIZED.** Powerful Google search optimization. Hosted on our very own planned.gifts domain.
- **ADVISORS PAGE.** Critical information at a glance; useful resource links; personal calculators.
- **ENDOWMENT CALCULATOR.** Showcases the impact philanthropy will have on future generations
- **ATTRACTIVE DESIGN.** Professionally designed with ease of navigation in mind.
- **ONLINE WILL PLANNER.** Optional, fully integrated online will planner that’s free for donors who want to make out a will.

**NEW!**

Bayshore Health  
Home | Gifts Anyone Can Make | Gifts That Protect Assets | Gifts That Provide Income | Contact Us

Planned Giving: People Helping People

Bequest Language  
Leave us in your will. It's a gift that costs nothing during your lifetime.

Philanthropy is a Calling  
What Is Planned Giving?

Make Dreams Come True  
Did You Know ...

- > A planned gift allows you to shape your own legacy – all while helping us to achieve and expand our mission.
- > It allows you to make a far bigger impact than annual gifts of cash.
- > A planned gift allows us to continue our mission far into the future, even while it helps make a difference today.

Sound too good to be true? It's not. The information on these pages will show you that the advantages of a planned gift are real and significant to the future of Bayshore Health.

By giving open up a whole world of possibilities for you to make a big difference to our mission while also securing your legacy – all for generations to come.

Can you make a gift that costs you nothing during your lifetime?

When you make a gift through your will or trust (called a "bequest"), you help secure our future financial strength without affecting your current asset or cash flow. It's the easiest major gift and has a far-reaching impact.

Compare Gift Plans

	Real Estate	Retirement Plan Assets, IRA	Retained Life Interest
<b>How does it work?</b>	Give appreciated real estate	Name nonprofit organization as the beneficiary of the plan	Give real estate but keep the right to use and enjoy it for life
<b>A good fit for donors who want to:</b>	Make a substantial gift, avoid capital gains tax, receive a large income tax deduction	Avoid double taxation at death; give tax-advantaged assets to heirs	Give a significant gift that doesn't affect donor's lifestyle
<b>How does donor make the gift?</b>	Donate the property to nonprofit organization	Name nonprofit organization as whole or partial successor beneficiary on your plan	Give real estate to nonprofit organization but retain lifetime use form
<b>Donor Benefits</b>			
<b>Reduce estate tax</b>	Removes taxable assets from the estate	Duration exempt from federal estate and income tax	Removes taxable assets from estate
<b>Reduce income tax</b>	Immediate deduction for full value	Heirs will avoid income tax	Deduction for value of the asset, less value of your right to keep using it
<b>Reduce or eliminate capital gains tax</b>	Complete avoidance		
<b>Get income back from the gift</b>			
<b>Give an asset but keep enjoying it</b>			

**Bequest**  
A bequest is a gift made through your will or living trust. It can be the easiest gift to make to Bayshore Health because it costs you nothing during your lifetime. Plus, it's "taxable" to you only on either an estate or capital gains tax basis. If you already have a will, you can amend it to include a bequest to Bayshore Health with a simple will. Otherwise, a will or trust document is needed. (See the "Bequest" section for more details.)

**Appreciated Securities**  
You transfer publicly traded securities that you own to Bayshore Health. We will then sell the securities and apply the proceeds to the charitable purposes that you designate. This can be an excellent way to avoid double taxation on the market value of the securities and also avoid capital gains tax on the securities' appreciation.

**Life Insurance**  
You designate Bayshore Health as a beneficiary of your life insurance policy. When the time comes, Bayshore Health receives the proceeds. Then, you can provide a large gift to Bayshore Health for relatively little cost. The policy proceeds must be paid to Bayshore Health within the specified time frame.

**Gifts of Real Estate**  
Real estate includes land and anything that grows on it. Other than property that Bayshore Health uses for an income-producing activity, we can accept gifts of real estate. Plus, you can elect to make an outright donation, or you can elect to fund a gift with your own income. Either way, you make a generous gift to

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