

WAYS TO GIVE: SUMMARY



Your Goal	Your Gift	How to Make the Gift	Your Benefits
Make a quick and easy gift	Cash	Write a check, make a donation on the website, ask the organization to put it on your credit card	Income tax deduction
Make a quick and easy gift	Transfer of Stock	Using the stock transfer form, transfer stock directly to the organization	Income tax deduction and avoidance of capital gains tax
Eliminate capital gains tax on the sale of a home or other real estate	Real Estate Gift	Donate the property to the organization or sell it to the organization at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Give your personal residence or farm, but continue to live there	Retained Life Estate	Transfer the deed of your home to the organization, but retain occupancy	Charitable income tax deduction and lifetime use of home
Make a large gift with little cost to yourself	Life Insurance Gift	Give a policy with the organization as owner and beneficiary	Current income tax deduction; possible future deductions
Avoid the twofold taxation on retirement plan assets	Retirement Plan Gift	Name the organization as beneficiary of the remainder of the retirement assets after your lifetime	Avoidance of heavily taxed gift to heirs, allowing less costly gifts
Create and/or increase income from assets	Charitable Gift Annuity	Create a charitable annuity that pays you a set income annually	Immediate income tax deduction and fixed income for life, remainder of the corpus passes to the organization
Create and/or increase income from assets; Create a hedge against inflation over the long term	Charitable Remainder Trust	Create a trust that pays you a fixed or variable percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase, remainder of the corpus passes to the organization
Reduce gift and estate taxes on assets passing to heirs	Charitable Lead Trust	Create a trust that pays the organization a fixed or variable income for a set term, and the remainder passes to your heirs	Reduced size of taxable estate; keeps asset in family with reduced taxes ramifications

For more information, please visit www.dinipartners.com or call (800) 836-0411

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