

# Choose The Gift Option That Matches Your Goals

<i>Your gift</i>	<i>Bequest</i>	<i>Revocable living trust</i>	<i>Outright gift of cash</i>	<i>Outright gift of securities</i>	<i>Outright gift of personal property</i>	<i>Gift of life insurance</i>	<i>Gift of retirement assets</i>	<i>Gift of real estate</i>	<i>Retained life estate</i>	<i>Charitable remainder unitrust</i>	<i>Charitable remainder annuity trust</i>	<i>Charitable gift annuity *</i>	<i>Charitable lead trust</i>
<i>Your goal</i>	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 or other personal item	Make a large gift with little cost to yourself	Avoid the twofold taxation on IRAs or other employee benefit plans	Avoid capital gains tax on the sale of a home or other real estate	Give your personal residence or farm now but continue to live there	Create a hedge against inflation over the long term	Secure a fixed and often increased income	Supplement income with a fixed amount that is partially tax free	Reduce gift and estate taxes on assets you pass to children or grandchildren
<i>How to make the gift</i>	Name us in your will (designate a specific amount, a percentage, or a share of the residue)	Name us the beneficiary of assets in a living trust	Simply write a check or make an online donation now	Contribute long-term appreciated stock or other securities	Donate tangible personal property related to our exempt function	Contribute a life insurance policy you no longer need and/or name us as beneficiary	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	Designate 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 a charitable gift annuity* contract with us that pays a fixed amount annually	Create a charitable trust that pays fixed or variable income to use for specific term of years; principal is retained for heirs
<i>Your benefits</i>	<ul style="list-style-type: none"> <li>• A donation exempt from federal estate tax</li> </ul>	<ul style="list-style-type: none"> <li>• Control of the trust for your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Possible estate tax savings</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable deduction based on the full fair market value</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable deduction based on the full fair market value</li> </ul>	<ul style="list-style-type: none"> <li>• Current income tax deduction</li> <li>• Possible future deductions through gifts to pay policy premiums</li> </ul>	<ul style="list-style-type: none"> <li>• The ability to leave less costly assets for your heirs</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Reduction or elimination of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Valuable charitable income tax deduction</li> <li>• Lifetime use of residence</li> </ul>	<ul style="list-style-type: none"> <li>• A variable income for life</li> <li>• Immediate income tax charitable deduction</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Fixed income for life, often at higher rate or return</li> </ul>	<ul style="list-style-type: none"> <li>• Current and future savings on income taxes</li> <li>• Stable payments for life</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced taxable estate</li> <li>• Often reduced gift taxes and your family keeps the property</li> </ul>

(\* Not available in some states nor from some institutions)  
 Courtesy of The National Hospice Foundation