

Giving Options Tailored to Your Needs

There are benefits to giving that go beyond supporting the mission of our Endowment Fund. Whether you *give now*, *give later* or *give & receive*, there are options to match your interests and financial circumstances, with maximum tax benefits for you.

GIVE NOW	GIVE LATER	GIVE & RECEIVE
<p>Make an immediate, outright charitable gift:</p> <ul style="list-style-type: none"> • Cash • Publicly traded securities (stocks and mutual funds) • Real estate • Closely held stock 	<p>Make a deferred charitable gift, retaining flexibility and control of the gift asset while living:</p> <ul style="list-style-type: none"> • Bequest through a will or living trust • Beneficiary proceeds • Retirement assets such as IRAs, tax-sheltered annuities, and 401(k) and 403 (b) plans can make a significant charitable gift upon your death • Life insurance 	<p>Make a gift and receive income payments for life. The charitable benefit occurs upon your death.</p> <ul style="list-style-type: none"> • Charitable gift annuity with gifts of cash or publicly traded securities (stocks and mutual funds) • Make a gift and receive income payments for life or a term of years, or both. The charitable benefit occurs upon your death. Charitable remainder unitrust or annuity trust with gift of cash, publicly traded securities (stocks and mutual funds). Unitrusts offer additional gift options of real estate and closely held stock.
<p>Benefits to you:</p> <ul style="list-style-type: none"> • Receive an immediate charitable deduction • Bypass capital gain tax on the appreciation of securities, real estate and/or closely held stock owned for more than one year 	<p>Benefits to you:</p> <ul style="list-style-type: none"> • Retain control over the assets while living • Designate all or a portion of the proceeds • Heirs avoid paying income and estate taxes on the assets • Immediate charitable deductions for premium payments when the Endowment Fund is named owner and beneficiary or retain ownership and control when 	<p>Benefits to you:</p> <ul style="list-style-type: none"> • You receive income payments for life, a portion of which is typically tax exempt • You begin receiving payments immediately or defer to a future date • Immediate charitable deduction • Ongoing payments from a unitrust are based on a set percentage and adjusted annually based on the value of your trust's assets. Annuity trust payments are for a fixed amount.

	the Endowment Fund is partial, sole or contingent beneficiary.	<ul style="list-style-type: none">• Immediate charitable deduction• Bypass capital gain tax if you give securities or real estate
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