

Gifting Options

Gift	Benefits	Goal
Cash, Securities, Personal Property	Income tax deduction: avoid capital gains taxes	Gift/tax savings
Living Trust/Revocable Gift	Control of trust for lifetime, possible tax savings	Controlled Gift
Bequest	Exemption from federal estate taxes	Legacy Gift
Life Insurance Beneficiary	Current income tax deduction	Legacy Gift
Property Gift	Immediate income tax deduction. Avoid capital gains taxes on home/real estate	Legacy Gift
Retained Life Estate	Retain occupancy of your residence or farm, designate the ownership to us.	Charitable income tax deduction and lifetime use of home or farm



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