



Planned Giving Options and Benefits Worksheet

For more information please call Walt Seibert at 763-520-0532

Bequest in Will	Revocable Living Trust	Gift of Cash	Gift of Securities	Gift of Personal Property	Gift of Life Insurance	Gift of Retirement Assets	Gift of Real Estate	Gift of Retained Life Estate	Charitable Remainder Unitrust	Charitable Remainder Annuity Trust	Charitable Gift Annuity	Charitable Lead Trust
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.	Make a gift of an asset that's no longer needed and generate an income tax deduction.	Give your personal residence, vacation home or farm now, but continue to live there.	Create a hedge against inflation over the long term and supplement your retirement income.	Secure a fixed income and supplement your retirement funds.	Supplement income with steady payments that are partially tax-free.	Reduce gift and estate taxes on assets you pass to children or grandchildren.
Name a charity in your will (designate a specific amount, a percentage or a share of the residue).	Name the charity as beneficiary of assets in a living trust.	Simply write a check.	Contribute long-term appreciated stock or other securities.	Donate tangible personal property used for our tax-exempt function.	Contribute the rights and proceeds of an existing or recently acquired life insurance policy you do not need.	Name a charity as the beneficiary of the remainder of the assets after your lifetime.	Donate the property to a charity or sell it at a bargain price.	Deed ownership of your home to a charity, but retain occupancy.	Create a trust that pays a fixed percentage of trust's assets, which are revalued annually.	Create a charitable trust that pays you a set income annually.	Enter into a charitable gift annuity contract with a charity that pays a set amount for one or two lives.	Create a charitable trust that pays fixed or variable income to us for a specific term of years; retain the principal for your heirs.
<ul style="list-style-type: none"> ■ donation is exempt from federal estate tax ■ maintain control of asset for your lifetime 	<ul style="list-style-type: none"> ■ maintain control of the trust for your lifetime ■ gift in trust is exempt from federal estate tax 	<ul style="list-style-type: none"> ■ immediate income tax deduction ■ removes taxable assets from your estate 	<ul style="list-style-type: none"> ■ immediate charitable deduction of full fair-market value ■ avoid capital gains tax 	<ul style="list-style-type: none"> ■ charitable deduction based on the full fair-market value 	<ul style="list-style-type: none"> ■ immediate income tax deduction ■ future deductions through gifts to pay policy premiums 	<ul style="list-style-type: none"> ■ make the gift from the most highly taxed assets, leaving more for your family ■ avoid income and estate tax 	<ul style="list-style-type: none"> ■ immediate, fair-market value income tax deduction ■ reduction or elimination of capital gains tax 	<ul style="list-style-type: none"> ■ valuable charitable income tax deduction ■ continued use of residence for your lifetime 	<ul style="list-style-type: none"> ■ receive a variable income for life ■ immediate income tax charitable deduction 	<ul style="list-style-type: none"> ■ immediate income tax deduction ■ fixed payments for life, often at a higher rate of return 	<ul style="list-style-type: none"> ■ current and future savings on income taxes ■ receive stable payments for life 	<ul style="list-style-type: none"> ■ reduce your taxable estate ■ your family keeps the property, often with reduced gift taxes.

This publication is not intended as legal advice. For legal advice, please consult an attorney.