

## PHILANTHROPY IS AN EXPRESSION

of your generosity with the understanding that your gift to us can make a difference. There are many ways in which you can make a gift to further our important work. The goal of this brochure is to explain some of the common ways for you to make gifts that help us and provide you with valuable tax and income benefits.

If after reading this information, you still have questions, please contact us. We will be happy to provide you with a personalized illustration of any of the gift options described and explain the benefits to you.

## Planned Gifts

The term planned gifts refers to specific strategies that benefit us at some point in the future while offering immediate benefits to you.

### How Can We Help?

- ☐ Please contact me with more information about planned gifts and estate planning strategies.
- ☐ I have already included your organization in my will or trust.
- ☐ Please send me your FREE estate planning guide.

The best way to contact me is by:

☐ Email ☐ Mail ☐ Telephone

Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_

State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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10733 Sunset Office Drive  
Suite 300

St. Louis, MO 63127

Phone: 800-843-5233

Fax: 314-996-1131

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gift.development@lcef.org

Expressions  
of  
Philanthropy



AN OVERVIEW OF  
GIVING OPTIONS



## Current Gift

A current gift is a gift that you make today with immediate benefits. There are several different ways for you to make a current gift to us.

### CASH

A cash gift is usually the easiest and most convenient way to make a gift to charity. We are able to make use of your cash gift right away and you receive a valuable income tax charitable deduction to offset your taxes on this year's return.

### SECURITIES

A gift of stocks or bonds may provide you with an even greater tax benefit. If you have owned securities for more than one year and the value has increased, you can avoid capital gains tax and receive a charitable income tax deduction equal to the fair market value of your gift to us.

### REAL ESTATE

A gift of your real estate that has been held for more than a year also has the advantage of providing you with a charitable tax deduction based on the current value of the property, as well as enabling you to avoid capital gains tax on the sale of your property.

### PERSONAL PROPERTY

Selected artwork, books and antiques are examples of personal property that may also make nice gifts to us. To ensure that your gift of personal property qualifies for a favorable charitable tax deduction, please contact us.

## Gifts That Generate Income For You

You can have a charitable income deduction, estate tax givings and the ability to avoid capital gains taxes.

### CHARITABLE GIFT ANNUITY

A charitable gift annuity is a great example of how a gift to us can generate income for you. You transfer your cash or property to us and we promise to make a fixed payment to you for life at a rate based on your age. In addition to the security of fixed income, you receive a charitable income tax deduction and a portion of each of your annuity payments may be tax free. The deferred payment gift annuity in which annuity payments are delayed for more than one year offers rates that make it an attractive supplement to your retirement income.

### CHARITABLE REMAINDER TRUST

The most versatile charitable giving tool, the charitable remainder trust (CRT), can help you avoid capital gains tax on the sale of your appreciated assets, generate regular increased income for you, provide you with a charitable income tax deduction and fulfill your philanthropic objectives.

Your CRT will be invested to produce income and take advantage of investment growth opportunities.

### CHARITABLE BEQUESTS

Next to writing a check, perhaps the best known vehicle for philanthropy is the bequest. A bequest is a gift that is made through your will or trust and can establish your wishes today without relinquishing needed assets during your lifetime.

For more information on bequest giving options or to request our FREE Guide to Planning Your Will, please contact us. We can also refer you to a qualified estate planning attorney if you are looking for someone to draft your plan.

