

PLANNED GIVING OPTIONS	Personal & Economic Benefits	A-T Benefits
<p data-bbox="224 533 519 604">Charitable Remainder Unitrust*</p> <p data-bbox="224 737 519 808">Charitable Remainder Annuity Trust*</p> <p data-bbox="201 947 542 982">Charitable Gift Annuity**</p> <p data-bbox="228 1142 514 1178">Charitable Lead Trust</p> <p data-bbox="201 1325 542 1396">Bequest through a Will or Living Trust</p> <p data-bbox="347 1541 396 1577">IRA</p>	<p data-bbox="602 709 938 821">Receive a current income stream and an immediate income tax deduction</p>	<ul data-bbox="1040 478 1458 1052" style="list-style-type: none"> <li data-bbox="1040 478 1458 743">• Income beneficiary(ies) over 65 years old: Regardless of allocation, donor will receive 1 point per \$100 on the current face value of gift at the time of the gift <li data-bbox="1040 751 1458 1052">• Income beneficiary(ies) under 65 years old: Regardless of allocation, donor will receive 0.5 points per \$100 on the present value of gift, determined by the IRS discount rate and age of donor
	<p data-bbox="602 1108 997 1220">Freeze value of assets contributed for gift and estate tax purposes</p>	<ul data-bbox="1040 1066 1382 1255" style="list-style-type: none"> <li data-bbox="1040 1066 1382 1178">• Full point credit for the annual income that A-T receives <li data-bbox="1040 1186 1328 1255">• A-T giving level and recognition
	<p data-bbox="602 1304 997 1415">Control assets during donor's lifetime, and receive an estate tax deduction</p>	<ul data-bbox="1040 1270 1458 1451" style="list-style-type: none"> <li data-bbox="1040 1270 1458 1451">• Donor will receive 0.5 points per \$100 on the present value of gift, determined by the IRS discount rate and age of donor
	<p data-bbox="602 1486 997 1633">Avoid estate tax on retirement plan assets while making other property available for donor to pass to heirs</p>	<ul data-bbox="1040 1474 1458 1654" style="list-style-type: none"> <li data-bbox="1040 1474 1458 1654">• Donor will receive 0.5 points per \$100 on the present value of gift, determined by the IRS discount rate and age of donor

* A-T must be irrevocable beneficiary, minimum gift of \$100,000 required with additional gifts permitted

** A-T must be irrevocable beneficiary, and minimum gift of \$25,000 required

Donors who establish a named endowment through any of these giving vehicles will get 1.5 points per \$100 for the annual withdrawal amount.