



Create a Legacy For Birds in the Bay!



WHAT IS PLANNED GIVING?

Planned giving is a win-win approach to philanthropic donations that supports your favorite nonprofit organization and can benefit you now or in the future. Have you ever made a vehicle donation to benefit your favorite charity? If you have, you know that transferring assets is easy and it can provide tax benefits as well. Simply put, “planned giving” is the transfer of assets to a designated nonprofit organization during a lifetime or as part of an estate plan. This forward-thinking approach to giving is “planned” because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

It’s easy.

Planned giving is easy to do and you don’t have to be wealthy to do it. Whether it is naming your favorite charity in your will or trust for a modest amount, or a gift of house and property, there is an easy option that is right for you.

It can involve assets you might never think of.

A life insurance policy. Real estate. Stocks. Business holdings. A checking or savings account. These are all assets that can be leveraged in planned gifts.

It can generate an income stream.

In return for the donation of real estate, stocks or other assets, donors can receive a series of regular payments.



It can provide generous tax benefits.

Depending upon the type of gift, short-term and/or long-term tax benefits may apply. Donors at a variety of income levels can benefit. Be sure to consult with your financial or estate planner for more specifics.

It can work in tandem with other family priorities.

Planned giving is not an “all or nothing” option. Gifts can exist side-by-side with other beneficiaries and personal priorities.

It is long remembered.

Designating a planned gift automatically makes you a member of the organization’s legacy society. Legacy society members often receive immediate recognition on an organization’s website, in publications and receive invitations to special events.

In addition to the satisfaction of making a meaningful gift, most planned gifts have immediate and/or long-term tax benefits. The chart below can help you find the type of gift that is right for you. Consult with your financial advisor or estate planner and join the legacy society of your favorite nonprofit organization today.

Gifts at a Glance			
Donor Profile	How It Works	Benefits to Donors	Gift Type
Donors of any age or income level	Gift of any amount through a will, trust, life insurance policy or IRA	Estate tax benefits	Bequest
Donors of any age, most often middle-aged Good for complex or appreciated assets	A gift of cash in return for variable payments (% of gift) Upon passing, remainder is distributed to the charity	Annual income that can adjust over time; act as hedge against inflation May avoid capital gains taxes on appreciated assets Income tax charitable deduction in year of gift	Charitable Remainder Trust
Older donors who want to help a charity, have liquid assets (such as stocks, CDs, savings accounts) Middle-age donors who want to provide income for their parents or others	A gift of cash or stock in return for fixed payments to the donor for life Upon passing, remainder is distributed to the charity	Security of a fixed income for life Knowledge it is guaranteed by organization Income tax charitable deduction in year of gift	Charitable Gift Annuity
Older donors who own their own homes	A gift of primary residence, vacation home or other property	Donor can continue to live in or use property Income tax charitable deduction in year of gift	Retained Life Estate

Anyone considering a planned gift should consult a tax and/or legal advisors to determine the consequences of making a gift.