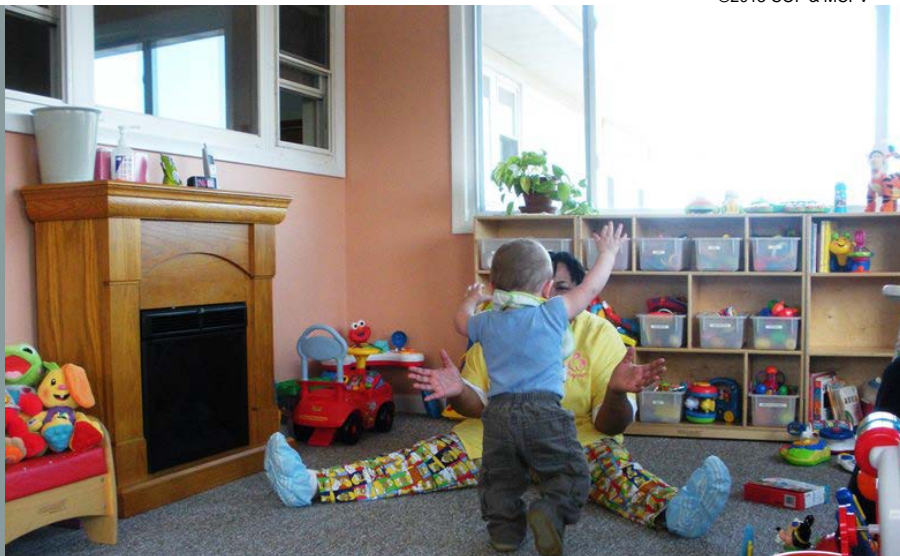


CHARITABLE GIFTS

Achieve the greatest good
with a creative **giving solution**
designed around you.



OUTRIGHT GIFT. Donors make a gift to Legacy Foundation with cash, stocks, bonds or other assets and receive immediate tax advantages.

BEQUEST BY WILL. Donors establish a fund in their names (or in the name of their family) by designating a gift or portion of their estate to Legacy Foundation and in some cases, receive a substantial reduction in federal gift and estate taxes.

REAL ESTATE. Turn property gains into community impact. The value of real estate may exceed that of any other owned assets. Donors may use it to establish or contribute to a Legacy Foundation fund; fulfill charitable interests and receive tax benefits.

RETIREMENT ACCOUNTS. Choose giving to your community over taxes. Naming the Legacy Foundation as a beneficiary of a retirement account (401k, 403b, or IRA) is an easy way to make a significant, lasting gift and reduce estate taxes.

LIFE INSURANCE. Name Legacy Foundation as the full or partial beneficiary of a life insurance policy. It's a simple way to make a major to the community that the donor calls home, with possible tax benefits during the donor's lifetime.

CHARITABLE GIFT ANNUITY. Give cash or property to Legacy Foundation now, get immediate tax benefits and ensure that the donor or his or her loved one receives fixed income payments for life.

CHARITABLE TRUSTS. Place cash or property in a Charitable Remainder Trust that pays income to the donor or a loved one for life. After death, the balance transfers to the Legacy Foundation for a charitable purpose the donor has selected. The donor receives income tax benefits the year the trust is established. Or establish a Charitable Lead Trust that pays a fixed amount to Legacy Foundation for a number of years. After this period, trust assets transfer to the named beneficiaries. In some cases, this arrangement reduces federal gift and estate taxes.

HOW DONORS GIVE

78.8% cash or check

47.5% credit card

45.6% online

20.7% stocks or mutual funds

*12.7% non-financial assets
(real estate, collectibles)*

6.2% crowdfunding (Kickstarter, Indiegogo)

GIVING YOUR CLIENT THE BEST OPTION TO GIVE

The majority of Americans are still giving to charity with cash — the least efficient way to give. Advisors are in the best position to help them be more strategic. There are a number of charitable vehicles you can offer. We can help you get to know them and better inform your clients.