

Charitable Gifting in Your Estate Plan



If you are charitably-inclined and are looking for ways to give back to your community or support a cause you cherish, consider making charitable giving a part of your estate plan. There are a variety of ways to gift through resources such as Charitable Gift Annuities, Charitable Gift Life Insurance, and/or Charitable Trusts; each of these will provide you with the opportunity to leave the legacy you had intended.

The Three Stages of Gifting

Choose a charitable cause that is important to you

The first step is deciding which charity or cause is meaningful to you and your family. Consider the following:

What issues
concern you?

What do you worry about
for future generations?

How do you want
to be remembered?

Select the assets to gift

After you have identified the charity or cause you would like to donate to, the next step is deciding what assets you would like to gift. While cash is typically universally accepted, charities often accept other assets such as stocks, bonds, real estate, and/or collectables. Determining which assets you plan on donating will help you structure which form of charitable giving is right for you.

Decide how to donate your gift

The final step when making a gift to a charity is choosing how you would like to make your donation. You can place your assets in a Charitable Gift Annuity, Charitable Trust, and/or Charitable Gift Life Insurance Policy. While you can donate assets to a charity in your Will, having them placed in any of these options will ensure your donation does not become a matter of public record, allowing it to be made without the delays of probate.

Give a gift that will brighten someone's tomorrow

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