



INFAITH INSIGHTS

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Simplifying Charitable Gifts of Complex Assets

There's a reason the term 'complex' is used to describe certain assets your clients may want to give to charity. This category of gifts is not as easy as turning over cash, stock certificates or keys to a property.

Most charities are not equipped to receive complex gifts. An appraisal and additional paperwork are often required. Tax and legal advisors may need to be consulted. InFaith Community Foundation is ready to support you and your clients who have complex assets to give.

InFaith has experience with complex assets of:

- Privately or closely held stock (C-corp or S-corp)
- Farm equipment and crops
- Limited liability companies
- Limited partnerships
- [Life estate reserved](#), where donors continue to use their property while living

Making a Difference & Being Good Stewards

When a long-time client approached Financial Consultant Paul Dahlgren with questions about giving rental properties owned by his construction company, Paul knew InFaith could handle the complexities. He's worked with InFaith since establishing his own donor advised fund 20 years ago.

Paul says, "For people who do this kind of planning, it's about making a difference and being good stewards. InFaith can be part of that process." [Read Paul's perspective](#) on helping clients with legacy planning.

Range of Tax Advantages

Properly structured, complex gifts may provide a range of tax advantages for your clients. Depending on the asset, clients may be able to deduct the current fair market value or cost basis of their property, either all at once or carried over for years. They may also avoid capital gains or ordinary income taxes on the sale of the assets, many of which have likely been held for years and are highly appreciated.

This can be a growing market for your practice as more baby boomers retire with a generous combination of charitable intent and complex assets. If you have clients who are considering their options, call an InFaith gift planner. You can also give shape to their goals with InFaith's [Complex Asset Questionnaire](#) or [Real Estate Questionnaire](#).

Get Started Today

InFaith gift planners are ready to consult with you on potential specific cases or meet directly with you and your clients. Call 800-365-4172 today.

RESOURCES

[Contact a Gift Planner](#)

New! Introducing InFaith [advertisements for FRs](#) to help grow their charitable business in the community.

[inFaithFound.org](#)

[FR Resources Webpage](#)

[InFaith on WeThrive](#) (for Thrivent FRs)

[Request InFaith Materials](#)

[Thrivent & InFaith](#)

[FR Handbook](#)

Consider exploring [your personal giving as an FR](#).

You'll be able to provide a personal endorsement to your clients while supporting charities and causes that mean the most to you.

["How Tax Reform May Affect Giving to Churches and Nonprofits" Webinar Recording](#)

Thank you for sharing our monthly e-newsletter with colleagues. They can [subscribe here](#).

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InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, gifts are tailored to each donor's charitable interests and financial circumstances. InFaith Community Foundation is a proven steward of these gifts, earning consistently high ratings from Charitable Navigator for sound fiscal management and GuideStar for transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities.

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