

GIVING OPTIONS & BENEFITS

Together with InFaith Community Foundation, you can create a thoughtful, effective giving plan that matches your giving interests and financial circumstances.

YOUR PREFERENCE	GIFT OPTIONS	BENEFITS
<p>Give Now Make an immediate, outright charitable gift</p>	<ul style="list-style-type: none"> • Cash • Publicly-traded securities (stocks and mutual funds) • Real estate, closely-held stock (S-corp, C-corp), crops/farm equipment, LLCs and partnerships • Qualified Charitable Distributions from IRAs 	<ul style="list-style-type: none"> • Receive an immediate charitable deduction • Bypass capital gains tax on the appreciation of securities, real estate and/or closely-held stock owned for more than one year
<p>Give Later Make a deferred charitable gift while maintaining flexibility and control of the asset while living</p>	<ul style="list-style-type: none"> • Bequest through a will or living trust • Beneficiary proceeds, including retirement assets such as IRAs, 401(k) and 403(b) plans, annuities and life insurance 	<ul style="list-style-type: none"> • Retain control over the assets while living • Designate all or a portion of the proceeds • Heirs avoid paying income and estate taxes on assets given
<p>Make a significant charitable gift upon your death</p>	<ul style="list-style-type: none"> • Life insurance 	<ul style="list-style-type: none"> • Receive an immediate charitable deduction for premium payments when InFaith is owner and beneficiary. You may use either cash or securities for your premium payments • Name InFaith as owner and beneficiary of an existing insurance contract and receive an immediate charitable deduction for the value of the contract • Name InFaith as partial, sole or contingent beneficiary of a contract, and maintain flexibility and control of the policy while living
<p>Make a deferred charitable gift of real estate while continuing to use it</p>	<ul style="list-style-type: none"> • Real estate retaining life estate 	<ul style="list-style-type: none"> • Make a gift of your home, recreational property or farm while continuing lifetime use of the property • Receive an immediate charitable deduction for a portion of the appraised value • The property is excluded from probate
<p>Give & Receive Convert assets to ongoing fixed income payments to make a future charitable gift</p>	<ul style="list-style-type: none"> • Charitable gift annuity • Charitable remainder annuity trust 	<ul style="list-style-type: none"> • Receive a generous rate for ongoing income • Receive an immediate charitable deduction • With a charitable gift annuity, you and/or a loved one receive fixed income for life—a portion of which is typically tax exempt. You can also defer income • With an annuity trust, receive a set income for life or a term of years
<p>Convert assets to ongoing income payments that vary based on investment value to make a future charitable gift</p>	<ul style="list-style-type: none"> • Charitable remainder unitrust 	<ul style="list-style-type: none"> • Receive an immediate charitable deduction • Avoid capital gains tax upon transfer for gifts of securities and real estate • May offer a hedge against inflation by annually calculating payments using a set payment rate and the value of your trust's assets • Receive income for life or a term of years

continued on back

FOR MORE INFORMATION

For more information, please call InFaith Community Foundation at 800.365.4172 or visit inFaithFound.org.

Charitable giving can result in significant tax, legal and financial consequences. Because InFaith Community Foundation cannot give tax or legal advice, you are strongly encouraged to consult with your personal tax and legal advisors. According to the Uniform Prudent Management of Institutional Funds Act (UPMIFA), be advised that distributions from the endowment fund may include principal as well as earnings from time to time.

To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this brochure is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending another party to any transaction or matter addressed herein.



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



Spreading Joy. Changing Lives.®

WE OFFER

- Donor advised funds, collaborative funds and organizational endowments
- Breadth of giving options, including cash, stock, real estate, bequests, beneficiary proceeds, life insurance, charitable gift annuities, charitable remainder trusts and qualified charitable distributions
- Flexibility to give to any charity
- Maximum tax benefits based on when and how you give
- Donor-centered services and online access
- Mission-based investment options for charitable assets