Keeping the Arts Alive, Today & Tomorrow
With Planned Giving

Our host organizations today are eternally grateful, whether you tap into your passion, generosity, sense of responsibility or all 3! You make their life’s work possible, and enrich the lives of all who attend. Thank you for keeping the arts alive!

**Giving Today**

- Cash Donations – immediate benefit may include tax deduction
  - Check, Auto 3rd party EFT

- High Value, Low Cost Securities – immediate benefit may include tax deduction AND no capital gains tax

- Qualified Charitable Distribution – available to IRA Owners, age 70.5+, benefit may include keeping donated portion of RMD out of taxable income for that year

In-kind Donations & Volunteering

Trends in giving (ref. S McPherson, 1/24/17)
Securities, Business Interests, Cash, Life insurance, Personal property, Real estate, Retirement plan

Planned gifts are most commonly conveyed as a bequest through a final will, but you may wish to speak with your advisors about the following vehicles:

- Charitable Gift Annuity (CGA)
- Charitable Remainder Annuity Trust (CRAT)
- Charitable Remainder Unitrust (CRUT)
- Charitable remainder trust
- Charitable lead annuity trust
- Charitable lead trust
- Donor Managed Investment Account (DAF)
- Pooled income fund
- Retained life estate
- Testamentary life income

As always, please involve your Financial Advisor, Attorney and Accountant in any giving strategies you may consider.