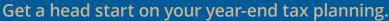


PLANNED GIVING BRIEF

Ending the Year Wel



✓ IRA Charitable Rollover

Congress made permanent the law that allows people age 70½ or older who own an IRA to make gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution.

V Outright Gift of an Asset

If you wish to make a gift to support our cause this year but are concerned about preserving your cash resources, consider a gift of an appreciated asset. A gift of securities, business interests or real estate can provide you with significant income and capital gains tax savings, often exceeding the benefits of a cash gift.

V Donor Advised Fund (DAF)

If you are looking for an end-of-year deduction but want more time to make thoughtful giving decisions, consider a donor advised fund (DAF). Our organization can use your tax deductible gift to establish a DAF in your name. You can make grants from your DAF now and in the future to support our work and other causes you care about.

Zero-Tax Gift and Sale

If you are planning to sell an asset like securities, real estate or a business, before you sell, consider a "zero-tax" charitable gift and sale. By making a gift of part of the asset before the sale, you can use a tax-saving charitable deduction to significantly lower or eliminate the capital gains tax on the sale.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Consider these worthwhile strategies before the year's end.



If you would like further information, please contact us at foundation@bgcaz.org or call 602.343.1258. We can help you create a plan that meets your needs and goals.

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