

CHARITABLE SOLUTIONS TO MEET YOUR CLIENTS' NEEDS

Client Concerns	Possible Situation	Charitable Solution
An immediate capital gains tax	Your client owns a rental property that provides income, but it is becoming too burdensome.	Donating the rental property to create a charitable remainder trust will secure lifetime income and eliminate capital gains taxes. Your client can receive a tax deduction and create a permanent fund to provide scholarships, support special charities or fulfill other charitable goals.
Concerned about taxes	Your client worries about paying capital gains taxes on appreciated property.	Donating the property to Legacy Foundation will eliminate or reduce capital gains taxes and give your client the satisfaction of creating a permanent, charitable fund.
Wishes to leave a legacy	Your client is writing a will and has no children so figuring out where to leave assets is perplexing.	Creating a permanent fund at Legacy Foundation lets your client be remembered forever and support special nonprofits or causes or provide scholarships for students.
Concerned about retirement plan assets	Your client has a retirement fund and worries about heirs receiving only 20 or 30 cents on the dollar.	Naming Legacy Foundation as the beneficiary of an Individual Retirement Account or other retirement fund lets your client create a charitable fund, reduce estate tax and eliminate income tax on the IRA distribution.
Wants to help a specific individual	Your client has a relative or friend he or she wants to help financially.	If your client is 60 years or older, a charitable gift annuity can provide income for life for him or her and one other person. After the deaths of both people, the remainder of the annuity will support a favorite charity or cause selected by the donor.
Wants to be charitable but is unsure where to give right now	Your client may have many charitable interests or anticipate receiving additional income this year and needs time to figure out where to make donations.	Starting a donor advised fund at Legacy Foundation will secure tax deductions for the current year and allow time to choose the charitable recipients. Our staff can help your client explore different charitable ideas.