

Ways to Give



	Beneficiary Designation	Bequest	Charitable Remainder Trust	Charitable Lead Trust	Donor Advised Fund (Remainders)	Life Insurance	Qualified Retirement Assets	Real Estate & Securities
DESCRIPTION	A meaningful gift made through a simple transfer of a financial account, after your lifetime.	A gift through your will or revocable trust enables you to provide significant support when you no longer require the asset.	An irrevocable gift to a trust that provides you or a loved one income for life or a set term. At termination, the remainder goes to ODC.	A generous gift of income payments to ODC for a set period (up to 20 years), after which the assets transfer back to grantor or heirs.	Your own charitable account from which you recommend distributions to your favorite nonprofits.	A generous gift of a policy that may no longer be needed.	A generous gift whose value to the ODC may be significantly greater than to family due to double tax treatment.	Appreciated real estate, securities, and personal property can be game-changing gifts for ODC.
NEXT STEPS	Change the beneficiary named at your bank or financial institution.	Name ODC in your will or living trust. You can choose a percentage or specific value.	Establish trust and name a trustee. Then transfer assets. (Appreciated assets avoid capital gains tax.)	Establish trust and name a trustee. Then transfer assets. (Appreciated assets avoid capital gains tax.)	Open a fund and transfer assets. (Appreciated assets avoid capital gains tax.)	Name ODC as beneficiary or change ownership of a paid-up policy.	Name ODC your beneficiary on a simple form from your plan administrator.	Consult, early on, with your advisors and the ODC to determine next steps.
MINIMUM	No minimum	No minimum	\$1MM*	\$1MM*	\$25K*	No minimum	No minimum	Case specific
BENEFITS	(1) Quick and simple. (2) No visit to your attorney.	(1) Retain the asset for your use during your lifetime. (2) Fully deductible for estate taxes.	(1) Fixed or variable income for life. (2) May have both income and estate tax benefits, depending on structure. (3) May be able to change beneficiary.	(1) May remove trust assets from estate, depending on structure (2) After the trust, assets go to heirs with little or no tax.	(1) Simple personal giving solution. (2) Multiple opportunities to give. (3) May involve family in charitable distributions. (4) Immediate income tax deduction.	(1) Potential income tax deduction. (2) Proceeds not subject to estate tax.	(1) Heirs receive fewer tax-burdened assets.	(1) Relief from burden of managing assets. (2) Removes property from estate, while avoiding capital gains tax.

*Minimums may vary between institutions.

Consult your qualified professional advisors on how a gift might fit into your estate planning and your eligibility for tax benefits.