

GIFT PLANNING

WHICH OPTION IS BEST FOR YOU?

Gift planning is a great way to use your resources to make a big impact on the work you care about most in a tax-efficient way. Here are 7 easy ways to ensure your treasures and resources continue making a difference for years to come.

Do you want the work you've started to continue for generations?

BEQUESTS

Help it continue long into the future with a bequest. A bequest is a gift you leave to Bethany in your will and can include cash, IRA holdings, real estate, or anything of discernable value.

Have you made investments you'd like to see do great things?

STOCKS OR QCDS

(QCDS FOR AGE 70.5+)

You can gift your highly liquid assets that are typically invested in public markets to Bethany to use to support our work together.

Do you want more convenience and simplicity in your giving?

DONOR-ADVISED FUNDS

A donor-advised fund has huge benefits including tax deductible contributions from growth or principal, simplicity and ease, flexibility, privacy, and growth potential.

Do you have a life insurance policy you took out years ago but no longer need?

LIFE INSURANCE

Use an existing or new life insurance policy to benefit Bethany and those who've been too often overlooked and ignored.

Do you need to plan for your retirement but also want to make an impact?

ANNUITIES

You can contribute a lump sum to Bethany and receive recurring payments of a portion of the initial gift amount for a fixed period or for life, depending on circumstances.

Do you own a business and have a big heart for kids and families?

BUSINESS INTEREST

You can use your business interest to gift shares of privately held businesses where you are a partial or majority owner. This is a great option if you're planning to sell your business soon!

Would you like to see your real estate change the lives of children, youth, and families?

REAL ESTATE

You can do just that when you make a gift of real estate. In some situations, you can even continue to live in a house you gift for the remainder of your life and take a tax deduction for your donation.

Have questions about these or other types of gift planning?

EXPLORE FURTHER!

Our gift planning team at Bethany is happy to answer your questions on these or other giving strategies!