



## CURRENT

## DEFERRED

## LIFE INCOME

	CURRENT			DEFERRED					LIFE INCOME			
Your Gift	Outright Gift of Cash	Outright Gift of Securities	Outright Gift of Personal Property	Bequest in Will	Gift of Life Insurance	Gift of Retirement Assets	Gift of Real Estate	Gift of Retained Life Estate	Charitable Remainder Trust	Charitable Remainder Annuity	Charitable Gift Annuity	Charitable Lead Trust
Your Goal	Make a quick and easy gift	Avoid tax on capital gains	Share your enjoyment of a collection or other personal item	Defer a gift until after your lifetime	Make a large gift with little cost to yourself	Avoid the twofold taxation on IRAs or other employee benefit plans	Make a gift of an asset no longer needed and generate an income tax deduction	Give your personal residence, vacation home or farm now but continue to live there	Create a hedge against inflation over the long term and supplement your retirement income	Secure a fixed income and supplement your retirement funds	Supplement income with steady payments that are partially tax-free	Reduce gift and estate taxes on assets you pass to children or grandchildren
How You Make the Gift	Simply write a check	Contribute long-term appreciated stock or other securities	Donate tangible personal property used for tax-exempt function	Name Gretna Glen in your will (designate a specific amount, a percentage or a share of the residue)	Contribute a life insurance policy you no longer need	Name Gretna Glen as the beneficiary of the remainder of the assets after your lifetime	Donate the property to Gretna Glen, or sell it to us at a bargain price	Deed ownership of your home to Gretna Glen but retain occupancy	Create a trust that pays a fixed percentage of trust's assets as revalued annually	Create a charitable trust that pays you a set income annually	Enter a charitable gift annuity contract with the church that pays a set amount for one or two lives	Create a charitable trust that pays fixed or variable income to Gretna Glen for a specific term of years; principal is retained for heirs
Your Benefits	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Removes property from estate</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate charitable deduction of full fair market value</li> <li>• Avoidance of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable deduction based on the full fair market value</li> </ul>	<ul style="list-style-type: none"> <li>• Donation is exempt from federal estate tax</li> <li>• Control of asset for your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>• Current income tax deduction</li> <li>• Possible future deductions through gifts to pay policy premiums</li> </ul>	<ul style="list-style-type: none"> <li>• Make the gift from the most highly taxed assets, leaving more for family</li> <li>• Avoids income and estate tax</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate fair market value income tax deduction</li> <li>• Reduction or elimination of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Valuable charitable income tax deduction</li> <li>• Lifetime use of residence</li> </ul>	<ul style="list-style-type: none"> <li>• Receive a variable income for life</li> <li>• Immediate income tax charitable deduction</li> <li>• May create succession income to heirs</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Fixed payments for life, often at a higher rate of return</li> </ul>	<ul style="list-style-type: none"> <li>• Current and future savings on income taxes</li> <li>• Stable payments for life</li> </ul>	<ul style="list-style-type: none"> <li>• Reduces your taxable estate</li> <li>• Your family keeps the property, often with reduced taxes</li> </ul>

# What Giving Plan is Best for You?

## Giving Worksheet

1. Why do I want to give to Gretna Glen Camp & Retreat Center?
2. When do I want to give to Gretna Glen Camp & Retreat Center?
3. Write down any questions you may have for your financial advisor or the Mid-Atlantic Foundation.