

Our mission is to help young people, especially those who need us the most, to reach their full potential as productive, caring and responsible citizens. And your donation can help make this a reality. For more information, please visit www.Clubgift.org

A Planned Gift could be:

WILL OR CODICIL BEQUEST: A bequest in your will can be used to leave any of the above outright gifts to the Boys & Girls Clubs of Sarasota County or to establish a planned contribution.

CHARITABLE GIFT ANNUITY: It is possible to make a donation of cash or securities to establish a Charitable Gift Annuity to provide you or another individual with guaranteed, partially tax-free income for life.

CHARITABLE REMAINDER TRUST: A Charitable Remainder Trust provides an individual with income for either life or a term up to 20 years from the date the gift is made. When the trust terminates, the Boys & Girls Clubs of Sarasota County receives the trust's principal.

CHARITABLE LEAD TRUST: A Charitable Lead Trust provides the Boys & Girls Clubs of Sarasota County with a steady income for a term of years or the life of an individual. When the trust terminates, the donor's designated heirs will receive the trust's appreciated principal.

LIFE INSURANCE: There are several ways to use life insurance to make a donation to the Boys & Girls Clubs of Sarasota County. The Clubs can be named as owner and beneficiary to an existing policy or a new policy can be established.

RETIREMENT ASSETS: The combination of federal income, estate and excise taxes can seriously erode the value of retirement savings. Naming the Boys & Girls Clubs of Sarasota County as a beneficiary of these assets can save your estate and heirs both income tax and federal estate taxes.

APPRECIATED STOCK: These assets that have a higher market value than their basis or tax purpose value. Such assets would, if sold by an individual or non-charitable organization at a price higher than their basis, potentially generate a taxable capital gains (either long-term or short-term depending on the holding period).

Goals & Gifts

Whether you want to eliminate taxes or benefit from an increased income stream, there is a gift to fit every objective. And no matter how or what you give, rest assured that you will be helping a cause close to your heart. The following chart details a gift vehicle for every goal. After determining the gift that is right for you, meet with your financial advisor or our organization to begin implementing your wishes. Please call Fran Levinson at 941-366-3911, or e-mail flevinson@boysandgirlsclubs.com, for more information.

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Make a quick and easy gift	Outright gift	Donate cash, securities or personal property	Income tax deduction; avoidance of any capital gains tax
Make a revocable gift during your lifetime	Living trust	Name us beneficiary of assets in a living trust	Control of trust for lifetime; possible estate tax savings
Defer a gift until after your lifetime	Bequest in will	Name us in your will	A donation exempt from federal estate taxes
Make a large gift with little cost to yourself	Life insurance gift	Give a policy with us as owner and beneficiary	Current income tax deduction; possible future deductions
Avoid the twofold taxation on retirement plan assets	Retirement plan gift	Name us as beneficiary of the remainder of the assets after your lifetime	Avoidance of heavily taxed gift to heirs, allowing less costly gifts
Avoid capital gains tax on the sale of a home or other real estate	Real estate gift	Donate the property to us, or sell it to us at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Give your personal residence or farm, but continue to live there	Retained life estate	Designate the ownership of your home to us, but retain occupancy	Charitable income tax deduction and lifetime use of home
Secure a fixed and often increased income	Charitable remainder annuity trust	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life
Create a hedge against inflation over the long term	Charitable remainder unitrust	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase
Supplement income with fixed annual payments	Charitable gift annuity	Enter a contract with us, in which we'll pay you fixed payments annually	Current and future savings on income taxes; fixed payments for life
Reduce gift and estate taxes on assets passing to heirs	Charitable lead trust	Create a trust that pays a fixed or variable income to us for a set term, and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes