

PLANNED GIVING

QUICK REFERENCE GUIDE

Use this planned giving quick reference guide to help determine the best strategy for achieving your philanthropic and financial goals.

For more information or to discuss these planned giving options, please contact:

610-821-5500
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LEHIGH VALLEY JEWISH FOUNDATION

THE JEWISH COMMUNITY'S ENDOWMENT FUND
Jewish Federation of the Lehigh Valley

702 North 22nd Street
Allentown, PA 18104

If your goal is to:	Then you can:	Your benefits may include:
Make a quick and easy gift.	Simply write a check now.	An income tax deduction and immediate charitable impact.
Avoid tax on capital gains.	Contribute long-term appreciated stock, other securities and assets.	An income tax deduction and immediate charitable impact.
Defer a gift until after your lifetime.	Put a bequest in your will (gifts of cash, specific property, or a share of the residue of your estate).	Coordinate your charitable giving with your family estate plan.
Receive guaranteed fixed income that is partially tax-free.	Create a charitable gift annuity.	Fixed, stable payments throughout your lifetime.
Avoid capital gains tax on the sale of a home or other real estate.	Donate the real estate or sell it to a charity at a bargain price.	An income tax reduction plus reduction or elimination of capital gains tax.
Avoid the two-fold taxation on IRA or other employee benefit plans.	Name a charity as the beneficiary of the remainder of the retirement assets after your lifetime.	Income tax relief to your family on inherited assets.
Give your personal residence or farm, but retain life use.	Create a charitable gift of future interest, called a retained life estate.	Tax advantages plus use of the property.
Make a large gift with little cost to you.	Contribute a life insurance policy you no longer need or purchase a new one and designate a charity as the owner.	Current and possible future income tax deductions.
Receive secure, fixed income for life while avoiding market risks.	Open a charitable gift annuity or create a charitable remainder annuity trust.	Tax advantages and steady income.
Give income from an asset for a period of years but retain the asset for yourself or your heirs.	Create a charitable lead trust.	Federal estate tax savings on asset and income tax deductions for donated income.
Create a hedge against inflation over the long term.	Create a charitable remainder unitrust.	Variable payments for life plus tax advantages.
Make a revocable gift during your lifetime.	Name a charity as the beneficiary of assets in a living trust.	Full control of the trust terms during your lifetime.
Create a charitable checkbook.	Create a Donor Advised Fund.	Make a charitable contribution and leisurely make gifts to your favorite charities over time.