

WAYS TO GIVE: PLANNED GIVING

Planned giving is the process of arranging legacy gifts as part of estate planning. Legacy gifts are usually distributed through a will or a trust, and can offer tax advantages for donors. These kinds of gifts provide donors the ability to make larger gifts than could be accomplished through income alone.

Types of planned gifts you can donate or designate to IHT:

Appreciated Securities

Avoid the capital gains taxes associated with selling your assets by donating appreciated securities.

IRA Qualified Charitable Distribution

Reduce your current tax liability by designating a portion of your IRA's required minimum distribution.

Retained Life Estate and Remainder Interest

Donate your home or land and continue to use the property for the duration of your lifetime.

Charitable Remainder Trusts

Reduce your current tax liability by donating the remainder of your trust.

Charitable Lead Trusts

Reduce eventual inheritance transfer taxes by donating trust income to IHT for a predetermined period of time, after which the remainder is paid to a named beneficiary.

Gifts of Retirement and Life Insurance Plans

Designate IHT as a beneficiary of retirement assets or life insurance policies.

For more information, please contact IHT Advancement Manager Erin Hepfner at ehepfner@ihtmv.org