



PLANNED GIVING

Maximize Your Philanthropic Goals

Most donors are unfamiliar with many of the smart gift planning strategies available today that can help them:

- Increase their personal income
- Reduce their taxes
- Establish a family legacy of philanthropy



Donors Vic & Marty Both

When Vic and Marty moved to Fairfield in 2017, they quickly appreciated the ease, quality, and friendliness of the services at Fairfield Memorial Hospital. Marty's fifty-year hospital career gives her a practical perspective from which to evaluate medical services. Vic is a retired city planner whose career spanned over three decades with the city of Chicago. They both agree that Chicago hospitals were bigger but not better, and they've expressed their appreciation in their estate plan, which designates FMHF as beneficiary.

Some Examples of What to Give

Gifts of Insurance

If your life insurance is no longer needed or will no longer benefit your survivors, it can make an excellent gift to charity.

Gifts of Cash

A gift of cash is a simple and easy way for you to make a gift. You will receive a charitable tax deduction that will provide you with savings on this year's tax return.

Gifts of Stocks & Bonds

A gift of your securities, including your stocks or bonds, is an easy way for you to make a gift. By making a gift of your appreciated securities, you can avoid paying capital gains tax that would otherwise be due if you sold these assets.

Gifts of Real Estate

A gift of your real property (such as your home, vacation property, vacant land, farmland or ranch or commercial property) can make a great gift. If you own appreciated real property, you can avoid paying capital gains tax by making a gift to charity.

Gifts of Retirement Assets

A gift of your retirement assets, such as a gift from your IRA, 401k, 403b, pension or other tax deferred plan, is an excellent way to make a gift. Unlike heirs, qualifying charities are not taxed upon receiving retirement assets.

Some Examples of How to Give

Bequest

You designate a charitable organization, such as the Fairfield Memorial Hospital Foundation, as the beneficiary of your asset by will, trust or other instrument.

IRA Rollover

If you are 70 ½ or older, you can donate directly from your IRA. Rollover donations satisfy your required minimum distribution for the year and reduce your taxable income, even if you don't itemize.

Charitable Remainder Trust

You transfer your cash or appreciated property to fund a CRT. The trust sells your property tax free and provides you with income for life or a term of years.

Charitable Lead Trust

You transfer your cash or property to fund a lead trust that makes payments to a charity for a number of years. You receive a charitable deduction for the gift. Your family receives the remainder at substantial tax savings.

Sale & Unitrust

If you give a portion of your property to charity to fund a charitable remainder trust, when the entire property sells, you receive cash and income for life.

Give It Twice Trust

You may be looking for a way to provide your children with income while making a gift to charity. The Give It Twice Trust is a popular option that allows you to transfer your IRA at death to a term of years unitrust.

Life Estate Reserved

You may desire to leave your home or farm to charity at your death, but would like to receive a current charitable tax deduction. A life estate reserved might offer the solution you need!

Get Your Complimentary Copy! ▶

Contact us for a complimentary copy of our 28-page Planning Your Legacy guide to providing for your family and supporting the causes you care about.



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