





# Charitable Checklist


Giving to your favorite charities may be as simple as writing a check—but there are more ways to give than you may realize, and we've put together this charitable checklist to make sure no opportunity goes unconsidered.


 **Set up a donor-advised fund**  
Get a tax deduction now and recommend distributions to charities when you are ready—especially useful when you have a highly taxable event. A donor-advised fund is a great way to simplify your charitable giving.


 **Give forever to the things you care about most**  
Have you been a longtime annual donor to a particular organization or cause? You can create an endowment at BCF to benefit the organizations or the cause you're passionate about. This ensures that they will continue to receive your annual gift in perpetuity.


 **Give appreciated stock**  
If you have held stock for more than one year that has increased in value you can donate that stock to BCF and receive a charitable income tax deduction for the full fair market value on the date of your gift.


 **Give your IRA – tax free**  
Your IRA is the most expensive asset in your estate, taxed both as a part of your estate and as ordinary income when withdrawals are made by heirs. Enjoy your IRA's income while alive and name BCF as the ultimate beneficiary, and choose other, less tax-prone assets to leave to your heirs.


 **Make a gift that pays you income for life**  
Are you charitably inclined but also interested in finding ways to supplement your annual income? You can make a gift to BCF now, receive a tax deduction, and in exchange receive a guaranteed lifetime income from BCF. Ask us about the options for gifts that pay you income for life.

 **Make a gift that gives you a tax credit**  
A state tax credit called "Endow Maryland" provides for a 25% credit for gifts to permanent endowments at BCF and other qualified Maryland community foundations.

 **Donate real estate**  
A home or vacation property you no longer need can be donated to BCF to create a charitable trust. The trust will provide lifelong income for you and/or loved ones, with the remainder going to a charitable fund at BCF to support the charitable purpose of your choice.

 **Transfer a business – tax favored**  
Are you considering selling a closely-held business? You can transfer ownership of all or a portion to a charitable fund at BCF, avoiding capital gains taxation on the transfer. Some gift arrangements can also provide you supplemental income.

 **Give life insurance**  
Do you own life insurance policies that you no longer need? You can transfer ownership of a policy to BCF, to use for the charitable purpose of your choice. Or you can open a new policy owned by BCF, and make a tax-deductible annual gift to cover the cost of the premium. Either option can result in a significant gift to charity.

 **Leave a Gift in Your Will**  
The simplest way to make a significant gift while reserving your assets for your own needs during your lifetime is to name BCF in your will or as a beneficiary of a financial account. BCF is here to make certain your charitable wishes will be carried out now and into the future.

## Questions? Contact

Keisha A. Leverette, Director of Development & Donor Services Phone: 410-332-4172 ext. 136 Email: [kleverette@bcf.org](mailto:kleverette@bcf.org)



2 East Read Street, 9th Floor, Baltimore, MD 21202 · 410.332.4171 · Fax 410.837.4701

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