

TOOLS FOR GIVING

Planned Giving

Outright Gift. You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Your gift qualifies for the maximum charitable benefit under state and federal law.

Bequest. You can designate a gift or portion of your estate to BCF and, in some cases, receive a substantial reduction in federal gift and estate taxes.

Gift Annuity. You can make a gift of cash or property to BCF now, get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life.

Charitable Remainder Trust. You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to BCF, and is placed in a charitable fund you've selected. You receive income tax benefits the year you establish your trust.

Charitable Lead Trust. You can place cash or property in a trust that pays a fixed amount to BCF for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

To learn about options for planned giving, including arrangements that offer lifetime income for you or another, contact:

Rosemary Calderalo

Director of Gift Planning

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A Variety of Giving Methods Tailored to your Unique Situation

You receive personalized service

Each individual, family, or organization we work with has unique charitable interests... and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.



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