

Endowed Gift and Bequest



A Strategy to
Support the Causes
You Care About,
Now and Forever



ENDOWMENT PARTNERS

Have you ever heard the phrase “blended gift” and wondered what that meant?

A blended gift is a combination of a current gift and a planned gift. It is a way to support the causes that you care about and make your giving go further.

A giving strategy that may appeal to you is a blended gift that consists of an endowed gift and a charitable bequest made in your will or trust. An “endowed gift and bequest” can help you achieve your goals. You can provide for your family, meet your financial goals and support the causes that matter most to you.

A Blended Gift Can Maximize the Impact of Your Giving

Did you know there is a way you can increase the impact of your giving and extend that impact in perpetuity? A blended gift strategy that includes a gift to our endowment today combined with a bequest will allow you to support the causes that you care about while making an impact today and creating your legacy.

How an Endowed Gift and Bequest Works



By carefully balancing your giving today and choosing how to leave a legacy tomorrow, you can see your gift at work now while also knowing your philanthropic work will continue.

Basic Benefits of an Endowed Gift and Bequest

	ENDOWED GIFT	BEQUEST
Increased Impact	An endowed gift will increase the impact of your giving. We will invest your gift and use the annual earnings to further our work.	A bequest will increase the impact of your giving. With a bequest, we will work with you to help you designate how we use your gift so that your gift achieves your goals and reaches its maximum impact.
Personal Satisfaction	An endowed gift allows you to see firsthand how your gift is making a difference.	A bequest will help you leave a lasting legacy that continues to make a difference even after you are gone.
Potential Tax Benefits	An endowed gift will allow you to take a charitable income tax deduction in the year of your gift to reduce your income taxes. If you make a gift of an appreciated asset, such as stock, you can also avoid paying capital gains tax.	A charitable bequest can produce a charitable estate tax deduction, which will reduce estate taxes if you have a taxable estate. What you leave to family (real estate and stock) and what you leave to charity (retirement assets) can also help reduce taxes for your family.



What Are Your Goals?



If your charitable goals include seeing how your gifts are making an impact while also leaving a lasting legacy . . .



If your tax planning goals include reducing your income taxes and avoiding capital gains taxes or future estate taxes . . .



If your personal and family goals include providing for family with a tax-wise estate plan . . .

Then an endowed gift combined with a charitable bequest may be right for you.

Definitions

Current Giving

Gifts made today to support our mission. These are typically made by cash, check or a gift of a specific asset, such as stock or real estate.

Charitable Bequest

A gift left to charity in your will or estate plan. You can leave a specific asset, a percentage of your estate, a residual gift (which is the rest of your estate after all other bequests have been made) or a contingent bequest (if the primary beneficiary, such as a relative, cannot accept or decides not to accept the bequest, the gift will go to the charity of your choice).

Charitable Income Tax Deduction

A tax benefit you receive when making a charitable gift. The deduction reduces your tax liability in the year that the gift is given to charity. The amount of the deduction is typically equal to the fair market value of the charitable gift.

Estate Tax Deduction

The potential tax benefit your estate and family will receive if you leave a charitable gift to an organization such as ours in your will, trust or other documents that are part of your estate plan.

Endowment

A charity's investment of certain gifts that earns a financial return for the charity to support its mission. The charity typically spends only the earnings of the endowment and continues to invest the principal so that the endowment continues to support the charity in perpetuity.



May We Help You?

To learn more about how you can make a significant gift to endow the future of our organization through one or more of these plans, please contact us. We would be delighted to talk with you and answer any questions that you have.

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