Choose the Gift Option that Matches your Charitable Goals.

Your Goal	Your Gift	How to Make the Gift	Your Benefits∗
Make a quick and easy gift	Outright Gift	Donate cash or personal property	Immediate Tax Deduction; Avoid Capital Gains
Make a revocable gift within your lifetime	Living Trust	Name us as the beneficiary of assets in a living trust	Control of Trust for lifetime; possible estate tax savings
Defer a gift until after your lifetime	Bequest in your Will	Name us in your will	Your gift is exempt from federal estate taxes
Make a large gift with minimal cost to yourself	Life Insurance Gift Stock, Bonds, Mutual Funds	Give a policy with us as owner and beneficiary Donate appreciated stocks, bonds or mutual funds	Current income tax deduction and possibly future deductions; avoid capital gains tax
Avoid twofold taxation on retirement plan assets	Retirement Plan Gift	Name us as the beneficiary of the remainder of the assets after your lifetime	Make the gift from the most highly taxed assets, leaving more for family; avoid income and estate tax
Avoid capital gains tax on the sale of real estate	Gift of Real Estate	Donate property to us or sell it to us at a very low price	Immediate tax deduction; avoid capital gains tax
Give your personal residence or farm while continuing to live there	Retained Life Estate	Designate us as the owners, but retain occupancy	Charitable Income Tax Deduction and lifetime use of property
Secure a fixed income	Charitable Remainder Annuity Trust	Create a charitable trust that pays you a set income annually	Immediate income tax deduction; fixed income for life
Hedge against inflation over the long term	Charitable Remainder Unitrust	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate tax deduction; annual lifetime income that has potential to increase
Supplement income with fixed annual payments	Charitable Gift Annuity	Create a contract with us in which we make fixed annual payments to you	Current and future saving on taxes; fixed lifetime payments
Reduce gift and estate taxes on assets you pass to family *ways2givecombined.indd *St. Mary's Foundation	Charitable Lead Trust	Create a trust that pays income to us for set term and then passes to heirs	Reduce your taxable estate; keep your property within your family, often with reduced taxes