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PLANNED GIVING BRIEFS

Blended gifts make your giving go farther



Jay's Story

Jay wanted to support one of our priorities at a significant level—\$100,000. However, he was only capable of giving \$25,000. We shared the idea with Jay that he could make a combination gift to achieve his objective. Here are several options Jay considered:

- \$25,000 cash gift today and a \$75,000 bequest in his will.
- \$25,000 gift of appreciated stock (no cash out-of-pocket and significant tax savings) and a \$75,000 bequest in his will.
- \$25,000 gift of appreciated stock, \$50,000 charitable gift annuity funded with stock (numerous tax advantages and fixed payments for life) and a \$25,000 bequest.

Jay selected the first option. By making a \$25,000 cash gift and satisfying the remaining balance with a bequest in his will, Jay was able to achieve his goal of a \$100,000 gift to his church. He liked the fact that he could see his dollars at work today and continue his commitment to the mission of his church in the future.

Have you considered combining a current gift with a planned gift to increase your impact and achieve your goals?

The Value of a Blended Approach to Giving

Gifts of cash and property help us further the mission of your church. There are many combination gift options that can make your giving go farther. This brief is designed to provide an overview of blended gifts—gifts that help you see the impact of giving today and ways to give that continue to support the mission of your church in the future.

Enjoy the Benefits of Giving Today!

Have you already included a bequest in your will or created another planned gift? You could begin to see the impact of your giving today by making outright gifts of cash or property. Here are some options and benefits to consider:

- Cash gift—Give and deduct the full value of the cash gift this year.
- Real property—Avoid paying capital gains tax by giving not selling your property.
- Investments such as stock—Make a gift of your investments for tax savings.

To learn more about creative ways that benefit you and your church, please contact us.



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