

SMARTER WAYS TO BE GENEROUS

(VERSUS PAYING TOO MUCH IN TAXES)



GIVE MORE WITH LITTLE OR NO ADDITIONAL COST





SmarterGenerosity.org

SMARTER WAYS TO BE GENEROUS

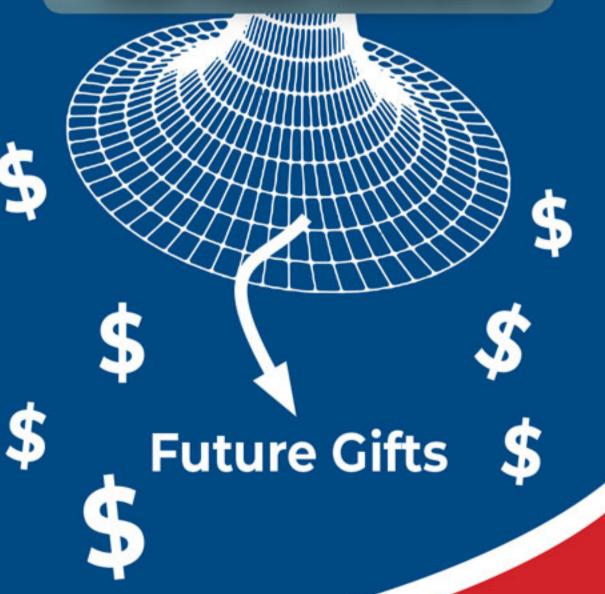


USE A DONOR ADVISED FUND

www.waterstone.org



- Don't rebalance and pay capital gains Donate
- Use for concentrated or "over-valued" positions
- Big income year give big bundle deductions
- Save taxes Itemize
- Build your retirement giving account



IF YOU'RE 70+ YRS OLD OR ARE TAKING YOUR MINIMUM DISTRIBUTIONS

Gift directly to charity and avoid ordinary income



INCLUDE CHARITIES IN YOUR ESTATE

- Be aware if your taxable estate will be subject to 40% estate tax.
- Best asset to gift part of your taxable IRAs, Annuities
- There are ways to create an income stream from charitable gifts



This is information not financial, tax or legal advise.

* Please consult with your tax and legal advisors.

Contact your charity for how to complete these gifts.



Thank You! Eric Weissgarber