



SMARTER WAYS TO BE GENEROUS

(VERSUS PAYING TOO
MUCH IN TAXES)



GIVE MORE WITH
LITTLE OR NO
ADDITIONAL COST



Smarter
GENEROSITY

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 com-
plete these gifts.*



Thank You!
Eric Weissgarber