



Choose the gift plan that matches your goals.

Estate Planning & Planned Giving												
YOUR GIFT	BEQUEST IN WILL	REVOCABLE LIVING TRUST	CASH GIFT	GIFT OF SECURITIES	GIFT OF PERSONAL PROPERTY	GIFT OF LIFE INSURANCE	GIFT OF RETIREMENT ASSETS	GIFT OF RETAINED LIFE ESTATE	GIFT OF REAL ESTATE	CHARITABLE REMAINDER TRUST	CHARITABLE REMAINDER ANNUITY TRUST	CHARITABLE LEAD TRUST
YOUR GOAL	Defer a gift until after your lifetime	Make a revocable gift during your lifetime	Make a quick and easy gift	Eliminate tax on capital gains	Share your enjoyment of a collection or other personal item	Make a large gift with little cost to yourself	Eliminate the two-fold taxation on IRAs or other qualified retirement plans	Give your personal residence, vacation home, or farm but continue to live there for the rest of your life	Make a gift of an asset no longer needed and generate an income tax deduction	Create a hedge against inflation over the long term and supplement your retirement income	Secure a fixed income and supplement your retirement funds	Reduce gift and estate taxes on assets you pass to children and grandchildren
HOW TO MAKE YOUR GIFT	Name LFSF in your Will (designate a specific amount, a percentage, or a share of the residue)	Name LFSF the beneficiary of appreciated assets in a living trust	Simply write a check or donate online	Contribute long-term appreciated stock or other securities	Contribute tangible personal property specifically used for Tax-exempt function	Contribute a life insurance policy you no longer need	Name LFSF as the beneficiary of the balance left after your lifetime using the plan's beneficiary form	Deed ownership of your home to LFSF but retain occupancy throughout your life	Donate the property to LFSF	Create a trust that pays you a fixed percentage of the trust's assets as revalued annually; name LFSF as beneficiary when the trust ends	Create a charitable trust that pays you a set income annually; name LFSF as beneficiary when the trust ends	Create a charitable trust that pays a fixed or variable income to LFSF for a specific term of years; thereafter the balance is given to loved ones
YOUR BENEFITS	Control of the asset for your lifetime, donation exempt from future federal taxes	Control of the trust for your lifetime, gift in trust exempt from future federal taxes	Immediate income tax deduction, you witness the benefits of your generosity	Immediate charitable deduction of full fair market value, elimination of capital gains taxes	Charitable deduction based on the fair market value	Current income tax deduction, possible future deductions through gifts to pay policy premiums	Make the gift from the most highly taxed assets, leaving more for the family	Valuable charitable income tax deduction, lifetime use of residence	Immediate income tax deduction, reduction or elimination of capital gains tax	Variable income for life, immediate income tax charitable deduction	Fixed payments for life often at a higher rate of return, immediate income tax deduction	Reduces your taxable estate; the property is kept by your family, often with reduced gift taxes