

Goals and Benefits

| ▶ <i>Your Goals</i> | ▶ <i>Your Strategy</i> | ▶ <i>Your Benefits</i> |
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| Maximize your deduction; minimize the gift details | Use cash to make your gift to the American Heart Association | Claim your deduction against a larger portion of your adjusted gross income and make an immediate impact on the American Heart Association |
| Afford a larger gift to the American Heart Association – and avoid capital gains liability | Give appreciated stock or bonds held over one year | Buy low and give high – make a gift that costs you less than the benefit it delivers to us, while avoiding capital gains tax |
| Make a gift for the American Heart Association 's future that doesn't affect your cash flow or portfolio now | Put a bequest in your will (cash, specific property, or a share of the estate residue) | Today – a gift that costs you and your family nothing. Tomorrow – an estate tax deduction |
| Retain income benefits from the assets you give to the American Heart Association – thus afford a larger gift | Make a contribution to our pooled income fund . Create a charitable gift annuity or a charitable remainder annuity trust or unitrust | Receive income for your lifetime; receive a charitable deduction; diversify your holdings |
| Reduce high tax liability now; gain additional income later | Establish a deferred gift annuity | A larger deduction and a higher income rate than other life-income gifts offer |
| Tap one of the most valuable assets in your portfolio to make a gift to | Use real estate to make your gift to the American Heart Association | Avoid capital gains tax, receive an income tax deduction – and have the |

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| the American Heart Association | | option of a gift that doesn't affect your lifestyle |
| Reduce gift and estate taxes and control the timing of passing assets to your children and grandchildren | Create a charitable lead trust which supports programs at the American Heart Association for a fixed, finite period with the principal going to your heirs. | Reduce gift and estate taxes, and freeze the taxable value of growing assets before they pass to your family |
| Avoid capital gains liability on the transfer of a business or partnership interest | Contribute the partnership interest or closely-held stock to the American Heart Association | Avoid capital gain liability, receive an income tax deduction, and utilize a gift asset you may have overlooked |
| Locate an overlooked asset that you can easily give to the American Heart Association | Name the American Heart Association as beneficiary of your retirement plan ; leave other assets to family | Eliminate income tax on retirement plan assets; free up other property to pass to your heirs |
| Make an endowment gift from income rather than capital | Create a new life insurance policy , or donate a paid-up policy whose coverage you no longer need | Increase your ability to make a significant gift to the American Heart Association |