

Making an Impact Through Giving



Giving From
Your 90%



**Desert
Southwest**



UNITED METHODIST
FOUNDATION

Making an Impact Through Giving

Are you looking for a way to make a significant impact in support of our work but do not know how? One option to consider is a gift of an asset rather than cash or a check.

What Assets Do You Own?

Perhaps you own one or more of the following assets:

- Appreciated Securities or Mutual Funds
- Real Estate
- Business Interests
- Collectibles
- Artwork

*Multiply and magnify
your generosity
through asset-based
charitable gifts.*

How You Can Benefit from Giving Your Assets

There are a number of ways that you can benefit from a gift of an asset to support our cause:

- You can bypass capital gains tax when making a gift of an appreciated asset.
- You can avoid income and taxes this year with an IRA rollover gift.
- Your gift should have no impact on your cash flow or standard of living.
- You can make a larger charitable gift than you ever thought possible.
- You may be entitled to take a tax deduction for the value of your gift.



Asset Gift Planning Strategies

There are a number of ways to make a significant gift from your assets to help support our cause. Here are a few ideas to consider:

Outright Gift

One of the simplest ways to give is by making an outright gift of an asset. If you are not ready to give away the entire asset, consider making a gift of a portion of the asset.

Fund a Donor Advised Fund (DAF)

When you make a gift of an asset to create or fund a donor advised fund (DAF), you can use the DAF to recommend grants to support the charities and causes you care about.

Part Gift, Part Sale

If you would like to sell an asset, consider giving part of the asset to us first. You may be entitled to take a charitable tax deduction for your gift, which can offset any tax owed on the cash you receive from your share of the sales proceeds.

Direct Gift from Your IRA

If you are at least 70½ years old, you can make a gift of up to \$100,000 per year from your IRA account directly to charity. This may be the easiest way to make a gift to help our cause. Because your gift may count toward your required minimum distribution, it can reduce your income and taxes this year.

Definitions

Donor Advised Fund (or DAF)

A way for a donor to give to charity over time. The fund is established with a charity and, after a donor contributes to the fund, the donor can recommend charitable gifts directly from the fund each year. The donor is entitled to take a deduction in the year contributions are made to the fund.

IRA Rollover Gift

A charitable gift made by the owner of an IRA directly to a qualified charity. The owner must be 70½ years of age or older, can transfer up to \$100,000 per year and the transfer may help the owner meet their "required minimum distribution" or RMD.



Let Us Help You

To learn more about the benefits of making a gift of your assets to support our cause, please contact us. We can work with you and your advisors to develop a plan that meets your goals.



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