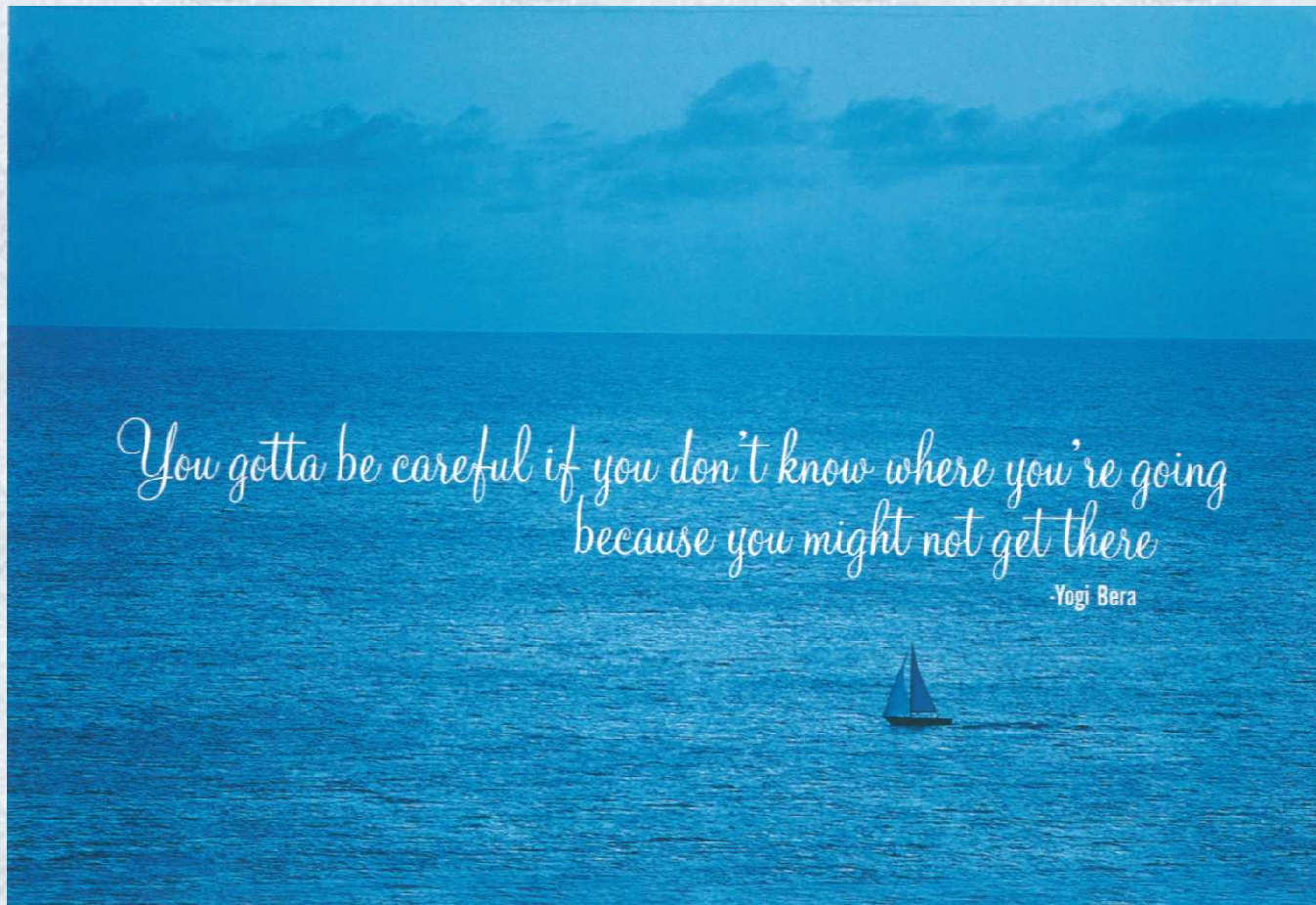


Planned Gifts Secure the Future of your Charity.

Nancy J. Leanues
Executive Director of Gift Planning
Cape Cod Healthcare Foundation

All donors must be aware of
your mission and your vision.



Planned Giving Program Roots:

Bequests, Bequests, Bequests, Bequests,
Bequests, Bequests, Bequests,
Bequests, Bequests, Bequests, Bequests,
Bequests, Bequests, Bequests,

Bequests andmore What?

Under “Will” Intentions, I would
also include under bequests
(all revocable intentions):

Life Insurance Policies

Retirement Accounts

Some Trusts

Life-Income Gifts

A gift plan through which a donor makes a gift and retains the right to payments for life (or a term of years).

Annuities and Pooled Income Fund Gifts are “irrevocable” commitments.

Trusts, of all types, can be either “irrevocable” or “revocable” gift arrangements.

Life-Income Gifts (cont.)

Upon the death of the last named payment beneficiary (or the end of a specified term of years) the remainder of the gift distributes to the charity.

Charitable Gift Annuities

Charitable Trusts

Charitable Remainder Trusts

Charitable Annuity Trusts

Pooled Income Funds

Benefits of Life-Income Gifts

A charitable Heart feels Great!!!
and, The Charity's Future is Stronger!!

Avoidance of Capital Gain Tax
(differs with different gift plans)

Substantial charitable deduction of federal taxes

Probate and Estate Expense reduction

Management of gifts absorbed by charity
(differs with different gift plans)

Real Estate Gifts

There are major and planned opportunities with real estate gifts.

Outright Gift

Gift Under One's Will

Retained Life Estate

The Bargain Sale

Trusts

Planned Gifts are an important component to any campaign.

Planned Gifts encourage outright gifts.

In challenging Economic Climates, donors welcome a new life-income stream.

Planned Gifts are Crucial for meeting goals.....let's chat!!!

Prize Opportunity!!

Who said:

“To give away money is an easy matter and in anyone’s power, but to decide to whom to give it, how much to give, when to give, and to give for the right motive and in the right way is neither in everyone’s power nor an easy matter. Hence, it is that such excellence is rare, praiseworthy and noble.”

Who said these wonderful words?

President Obama
Karen Bissonnette

Aristotle
Abraham Lincoln

It's important to have a *twinkle* in your wrinkle.

