

GREAT FUTURES START HERE.



Planned Giving for GREAT FUTURES

Planned Giving Overview

YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
Bequest	<ul style="list-style-type: none"> Maintain control of your assets during life Make a gift to the Boys & Girls Club of Erie County at your death 	You designate the Boys & Girls Club of Erie County as your beneficiary of your asset by will, trust, or other instrument.	<ul style="list-style-type: none"> Estate tax charitable donation Life use and ownership of your property
Charitable Gift Annuity (CGA)	<ul style="list-style-type: none"> Receive fixed income for life Avoid capital gains tax on the sale of your appreciated property Enjoy the benefit of tax savings from a charitable deduction 	You transfer your cash or appreciated property to the Boys & Girls Club of Erie County in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.	<ul style="list-style-type: none"> Charitable tax deduction Fixed income for life Partial bypass of capital gain Possible tax-free payments
Charitable Remainder Trust (CRT)	<ul style="list-style-type: none"> Transfer your appreciated property without paying capital gains tax Enjoy regular income for life or a term of years Receive the benefit of tax savings from a charitable deduction 	You transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax-free and provides you with income for life or a term of years.	<ul style="list-style-type: none"> Charitable tax deduction Income for life or a term of years Possible income growth over time Avoidance of capital gains tax
Charitable Lead Trust (CLT)	<ul style="list-style-type: none"> Give cash or property to your family in the future Avoid substantial gift or estate tax 	You transfer your cash or property to fund a lead trust that makes a gift to the Boys & Girls Club of Erie County for a number of years. You receive a charitable deduction for the gift. Your family receives the remainder at substantial tax savings.	<ul style="list-style-type: none"> Gift or estate tax deduction Asset and appreciation passes to family at a reduced cost
Beneficiary Designation	<ul style="list-style-type: none"> Maintain control of your assets during life Make a gift to the Boys & Girls Club of Erie County at your death 	You designate the Boys & Girls Club of Erie County as beneficiary of your bank account, life insurance policy, or other instrument.	<ul style="list-style-type: none"> Estate tax charitable deduction Lifetime use and ownership of your property
Individual Retirement Account	<ul style="list-style-type: none"> Maintain control of your assets during life Make a gift to the Boys & Girls Club of Erie County at your death Avoid possibly heavy taxes of IRA or retirement plan is left to non-spousal relatives 	You designate the Boys & Girls Club of Erie County as beneficiary of your IRA, 401(k), 403(b), or pension account.	<ul style="list-style-type: none"> Lifetime control of IRA, 401(k), 403(b), or pension account Lifetime income Estate tax charitable deduction

If you have any questions, feel free to contact Lisa Dudukovich, Executive Director at Lisa.Dudukovich@bgcsandusky.org or 440-371-4061.