

Gift Planning Calculations

Please select the type of gift that best describes what you would like to accomplish. If you would like additional information about how any of these giving vehicles can help you accomplish your financial, estate, and charitable planning goals, please contact us.

Gifts that Provide You with Income

Charitable Gift Annuity [[One Life](#) | [Two Life](#)] [[One Life Deferred](#) | [Two Life Deferred](#)]

A charitable gift annuity enables you to transfer cash or marketable securities to the charitable organization issuing the gift annuity in exchange for a current income tax deduction and the organization's promise to make fixed annual payments to you for life. Annuity payments can begin immediately or can be deferred to some future date.

Charitable Remainder Annuity Trust [[One Life](#) | [Two Life](#) | [Term of Yrs](#)]

A charitable remainder annuity trust is a custom designed and individually managed trust that enables you to retain a fixed income for your lifetime or a fixed term of years, claim a current income tax deduction, and make a future gift to charity.

Charitable Remainder Unitrust [[One Life](#) | [Two Life](#) | [Term of Yrs](#)]

A charitable remainder unitrust is a trust that pays you a percentage of the fair market value of the trust assets as revalued annually for a term of years or one or more lives. At the end of the trust term, the remaining principal goes to one or more charities you choose.

Gifts that Provide Income to Charity

Charitable Lead Annuity Trust [[Term NG](#) | [Term G](#)]

A charitable lead annuity trust is a custom designed and individually managed trust that enables you to give a fixed annual amount to charity for either a fixed term of years or the life of one or more individuals.

Upon conclusion of the measuring term, the trust terminates and, according to the terms of trust instrument, distributes its remaining assets (called the remainder interest) back to you or to one or more individuals that you have specified.

Charitable Lead Unitrust [[Term NG](#) | [Term G](#)]

A charitable lead unitrust is a custom designed and individually managed trust that enables you to give an annual income to charity for a fixed term of years or the life of one or more individuals. Upon conclusion of the measuring term, the remaining trust asset can revert to you or be transferred to one or more individuals that you select.

Depending on when the trust is established and who receives the remainder interest, you may qualify for a charitable income, gift or estate tax deduction.

Gifts with Retained Use

Life Estate Agreement [[One Life](#) | [Two Life](#) | [Term](#)]

A life estate agreement is an arrangement whereby you transfer title to a personal residence, farm, or yacht to charity while retaining the right to occupy and otherwise enjoy the full use of the property for your choice of a term of years or the lifetime of one or more individuals.

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