

Compare Types of Gifts

	Provision by Will	Charitable Remainder Annuity Trust	Charitable Remainder Unitrust	Retirement Plans	Charitable Lead Trust	Revocable Living Trust
Your Goals						
Reduce Income Taxes		✓	✓		✓	
Reduce Estate Taxes	✓	✓	✓	✓	✓	✓
Reduce Capital Gains Taxes	✓	✓	✓		✓	✓
Stable Income		✓				
Income Hedged for Inflation			✓			
Higher Payout on low Dividends		✓	✓			
Donation Assets						
Over \$200,000	✓	✓	✓	✓	✓	✓
Under \$200,000	✓			✓		✓
Cash	✓	✓	✓		✓	✓
Appreciated Securities	✓	✓	✓		✓	✓
Real Estate	✓		✓		✓	✓
Second Residence	✓		✓			✓
Tangible Property	✓					✓
Family Business	✓		✓		✓	✓
About You...						
About 70 or older	✓	✓	✓	✓	✓	✓

About 70 or Younger	v	v	v	v	v	v
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