



A PRESENTATION FOR:
41st Annual Nonprofit Organizations Institute & Fundamentals
TRACK G: Planning Vehicles and Trusts

GIVING TODAY PLANNING FOR TOMORROW

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WAYS TO GIVE TO SUPPORT A NONPROFIT

Giving is emotional – Working with legal counsel and tax advisors, donors can find the most tax-efficient solution for satisfying their charitable goals.

RECURRING
MONTHLY
DONATION

ANNUAL
FUND
GIVING

MAJOR
GIFTS

PLANNED
GIVING

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THE WELL-DESIGNED CHARITABLE GIFT

For a nonprofit to accept a gift from a donor, having a well-defined gift acceptance policy can help facilitate a smooth transfer of ownership of property.



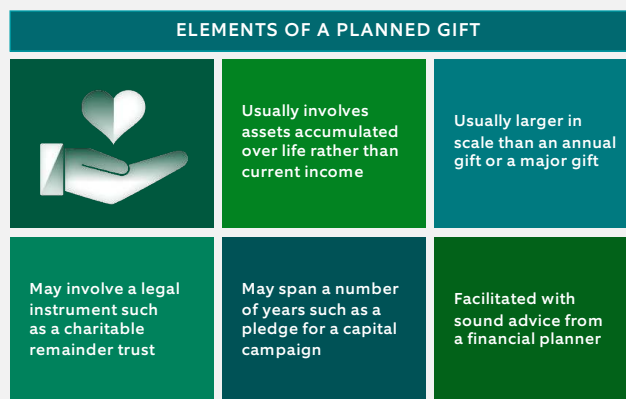
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WHAT IS PLANNED GIVING?

Planned giving is the allocation of resources in support of a nonprofit organization gifted during a person's life or upon death, as part of his/her overall wealth or estate plan.



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"Planning Vehicles and Trusts (CRTs, Annuities, etc.)"