

# PLANNED GIVING

## What is Planned Giving?

A planned gift is a contribution arranged in the present and allocated at a future date. Through a planned gift, you may provide ongoing support to the causes and organizations you care about.

Donors can choose structured gifts to be made after their lifetimes, and take advantage of financial and tax benefits.

For more information, contact Jose A. Marquez, CSPG, Director of Planned Giving at [jmarquez@iegives.org](mailto:jmarquez@iegives.org) or 951.241.7777.

## What are the benefits of Planned Giving?

- **It's simple** – Giving doesn't require great wealth and isn't complicated. Whether you choose to give now or later through your estate plan, you have options
- **May generate an income stream** – In return for your gift, you may receive fixed or variable income
- **Provides tax benefits** – Depending on the gift, tax benefits may apply
- **Leave a lasting legacy** – Your planned gift automatically qualifies you as a member of the organization's legacy society

You can benefit from life income gifts, gift annuities and other plans. Discover the best planned gift to meet your goals.

Gift Options		
Gift Type	How It Works	Benefits to Donors
Bequest	<ul style="list-style-type: none"><li>• Give a gift through a provision in your will or trust</li></ul>	<ul style="list-style-type: none"><li>• One of the easiest ways to give</li></ul>
Charitable Gift Annuity	<ul style="list-style-type: none"><li>• Transfer cash or appreciated property for fixed income</li></ul>	<ul style="list-style-type: none"><li>• Receive an income stream for life</li><li>• Charitable deduction in year of gift</li></ul>
Charitable Unitrust or Annuity Trust	<ul style="list-style-type: none"><li>• Transfer cash or appreciate property to fund a charitable trust</li><li>• The trust sells your property tax free</li></ul>	<ul style="list-style-type: none"><li>• Receive an income for life or a term of years</li><li>• Current year charitable income tax deduction</li></ul>
Life Insurance or Retirement Assets	<ul style="list-style-type: none"><li>• Designate us as the beneficiary of your life insurance policy or retirement assets</li><li>• Your estate may receive estate tax deduction</li></ul>	<ul style="list-style-type: none"><li>• Provides tax deduction benefits</li></ul>

Your attorney or tax professional can provide additional guidance on the best options to help you accomplish your financial and charitable goals.

The information provided is general and is not to be construed as tax, legal or financial advice. Your attorney or tax professional can provide additional guidance on the best options to help you accomplish your financial and charitable objectives.

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