

Charitable Instruments



OVERVIEW

A variety of giving methods tailored to your unique situation.

Outright Gift. You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Your gift qualifies for maximum charitable benefit under federal law.

Appreciated Securities. You can give appreciated securities to your community foundation to eliminate capital gains tax and get an immediate tax receipt for the market value of those securities.

Bequest. You can designate a gift or portion of your estate to your community foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes.

Life Insurance. You can designate the community foundation to receive a portion or all of the proceeds from your life insurance, reducing your estate taxes, or you can transfer the policy to the foundation's name and receive an immediate tax receipt for the cash surrender value.

Charitable Remainder Trust. You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to your community foundation, and is placed in a charitable fund you've selected. You receive income tax benefits the year you establish your trust.

You receive personalized service.

Each individual, family, or organization we work with has unique charitable interests... and unique financial circumstances.

We help you make the most of both, so you receive the greatest return on your community investment.



SMART & CARING
COMMUNITIES



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