

Donor Advised Funds

GIVE

to your fund and receive a tax deduction

Contribution



Deduction



GROW

your charitable assets



Donor Advised Fund

Administration



Investments



GRANT

to the causes you care about

Charitable Grants



WAYS TO GIVE

Choose the Gift Option that Matches Your Goals

An outright gift of cash is quick and simple. However, there are other assets you may consider contributing to your charitable fund with United Way of Palm Beach County, hosted at the Community Foundation, that could provide even more tax advantages.

| 7 GIFT OPTIONS to meet your goals | Outright gift of SECURITIES | Gift of REAL ESTATE | Gift of RETIREMENT PLAN ASSETS | Outright gift of PERSONAL PROPERTY | Gift of INSURANCE | Retained LIFE ESTATE | BEQUEST |
|-----------------------------------|---|--|---|--|---|--|--|
| If your goal is to: | Eliminate capital gains tax. | Eliminate capital gains tax on the sale of land or other real estate. | Eliminate the possible twofold taxation on an IRA or other employee benefit plan. | Share your enjoyment of a collection or other personal items. | Make a large gift with little cost to you. | Give your personal residence, but retain current use. | Defer a gift until after your lifetime. |
| Then you can: | Contribute long-term appreciated stock or other securities. | Donate the property to the Community Foundation to benefit your charitable fund. | Name your charitable fund the beneficiary of your retirement plan. | Donate tangible personal property like art or a coin collection. | Contribute the ownership of a life insurance policy you no longer need. | Create a charitable gift now, but retain occupancy for life. | Put a bequest in your will; give your charitable fund cash, specific property or a share of the residue. |
| And your benefits are: | A charitable deduction plus the elimination of capital gains tax. | An income tax deduction, plus reduction or elimination of capital gains tax. | The ability to leave your family other assets that carry less tax liability. | A charitable deduction based on the cost basis. | Current income tax deduction. | Tax advantages plus continued use of the property. | Donations exempt from estate tax. |

We thank you for working with United Way of Palm Beach County and the Community Foundation to assist in your charitable giving. We look forward to continuing our partnership to ensure the causes you care about are better together.

For more information, contact Brian Edwards at 561.375.6649 or BrianEdwards@UnitedWayPBC.org



Your Philanthropy
Our Community
Better Together



United Way
of Palm Beach County