

Estate Planning Toolkit

Over 60% of Americans Don't Have a Valid Will in Place. That's Your Audience.

Take the fear out of estate planning by educating your prospects on how to write a will, plan a bequest, and make other long-term arrangements in a way that aligns with their faith and meets their personal goals.

This simple, customizable Estate Planning Kit doubles as a networking tool. Use it as a leave-behind on donor visits. Give it out at Legacy Society luncheons, major donor gatherings or board meetings. Or hand them to advisors to pass on to their constituents. We'll even post it on your planned giving website!



Postcards

In a noisy world, they get your message heard.

Engage, inform, raise awareness.

- An attractive, welcome quick read.
- Affordable for multiple touches.
- Solid lead-generation tool.
- Available in any theme (humor; traditional; nostalgic; edgy; conservative; etc.)



Ways-of-Giving Brochures

Customized with your name, logo, colors and pictures. These affordable, branded brochures are a must-have for any nonprofit for daily use. All necessary planned gifts are explained in plain, simple English with helpful examples and planning tips.



Two Editions (both can be branded)

- **Estate Planning Guide.** A simple, step-by-step guide to estate planning with forms one can begin with before meeting with their attorney.
- **Live Well. Leave Well. Plan Your Estate for Those You Love.** An expanded version of the above with much more depth and insight into estate planning matters.

References & Resources



PlannedGiving.Wiki



Visit: PlannedGiving.com/shop

PLANNED GIVING VEHICLES — 2024 — Gift Comparison Chart



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	Cash	Securities	Real Estate	Personal Property	Bequest	Retirement Plan Assets, IRA	Life Insurance	Retained Life Estate	Bargain Sale	Charitable Gift Annuity	Charitable Remainder Trust	Charitable Lead Trust
How does it work?	Give cash	Give appreciated securities	Give appreciated real estate	Give artwork, collectibles, equipment or other types of tangible property	Simplest form of gift planning (plan now, give later)	Name NPO as the beneficiary of the plan	Name NPO as beneficiary and owner of a policy donor owns	Give real estate but keep the right to use and enjoy it for life	Sell real estate or other valuable property to NPO for less than fair value	Simple gift contract that provides lifetime payments to one or two persons	Trust that pays income for life or a term of years to donor and/or others. Assets ultimately benefit NPO	Trust that makes payments to NPO for a period of years. Assets ultimately pass to donor or heirs
A good fit for donors who want to...	Maximize the deduction; minimize the gift details	Avoid tax on capital gains; afford a larger gift to NPO	Make a substantial gift, avoid capital gains tax, receive a large income tax deduction	Put assets donor no longer needs or can maintain to good use	Make a gift that costs nothing during donor's lifetime	Avoid double taxation at death; give tax-advantaged assets to heirs	Make a gift at little cost	Make a significant gift that doesn't affect donor's lifestyle	Make a significant gift that doesn't affect donor's lifestyle	Supplement income with steady payments that are partially tax-free	Diversify assets, avoid or defer capital gains tax, secure often-greater income and possible inflation protection	Reduce gift and estate taxes on assets donor passes to heirs; lower income tax liability; retain control of assets
How does donor make the gift?	Write a check or give online now	Contribute long-term appreciated stock or other marketable securities	Donate the property to NPO	Donate tangible personal property related to NPO's tax-exempt function	Name NPO in will or living trust by designating a specific amount or a share of the residue	Name NPO as whole or partial successor beneficiary on your plan's form	Donate a paid-up policy donor no longer needs	Give real estate to NPO but retain lifetime use	Sign a contract to sell property to NPO at a discounted value	Establish a gift annuity contract with NPO that pays a set income for life	Create a trust that pays income to donor and/or others; principal (remainder) ultimately goes to NPO	Create a trust that pays income to NPO, principal (remainder) ultimately returns to heirs or donor
Donor Benefits (and how to describe it to them)												
Reduce estate tax	Removes taxable assets from the estate	Removes taxable assets from the estate	Removes taxable assets from the estate	Removes taxable assets from the estate	Donation exempt from federal estate tax	Donation exempt from federal estate and income tax	Donation exempt from federal estate tax	Removes taxable assets from estate	Removes gifted portion of value of asset from taxable estate	Removes taxable assets from estate	Removes taxable assets from estate	Can remove taxable assets from estate
Reduce income tax	Immediate deduction for full value	Immediate deduction for full value	Immediate deduction for full value	Immediate deduction for full value if NPO can use the asset		Heirs will avoid income tax	Current income tax deduction for paid-up policy.	Deduction for value of the asset, less value of your right to keep using it	Deduction for gift portion of asset	Deduction for gift portion of asset	Deduction for gift portion of asset	Limited
Reduce or eliminate capital gains tax		Complete avoidance	Complete avoidance	Complete avoidance	Complete avoidance			Complete avoidance	Partial avoidance	Partial avoidance	Partial avoidance	Varies
Get income back from the gift										Fixed payments for life for one or two individuals	Variable or fixed income for life	
Give an asset but keep enjoying it					Control of assets during lifetime	Continue to take withdrawals from plan during lifetime		Use of asset during lifetime				Property reverts to donor, or to heirs with reduced gift and estate taxes
More		Still like the stock? Use cash to buy at today's price and lock in a higher cost basis	Coordinate with charity before making donation	Can be used to make a significant gift without cash outlay	Make a substantial gift when donor no longer needs the assets	Often overlooked and easily given	Simple to set up; small financial commitment for large ultimate gift	Coordinate with charity before making donation	Use proceeds to help fund needs at a later stage in life (retirement facility, etc.)	Great retirement income supplement	Significant income and estate tax advantages	Best for assets expected to appreciate rapidly
How does it benefit NPO?	Delivers immediate benefits	Delivers immediate benefits	Delivers immediate benefits	Delivers immediate benefits	Ensures NPO's future strength	Ensures NPO's future strength	Ensures NPO's future strength	Ensures NPO's future strength	Delivers immediate benefits	Ensures NPO's future strength	Ensures NPO's future strength	Delivers immediate benefits