

MENU *for* CHARITABLE GIVING



D'YOUVILLE
FOUNDATION
A Legacy of Compassionate Care

D'Youville Foundation offers flexible giving options to meet your philanthropic wishes. Should you be interested in making a gift to the Foundation, please call us at 978.569.1055. When making gifts that are unusual for you, please consult with your family and financial advisor or estate planner for their advice.

My/Our Financial Goals are to:	<i>Support D'Youville now</i>	<i>Avoid capital gains</i>	<i>Avoid capital gains</i>	<i>Make a gift ~ large or small ~ with little cost to me/us</i>	<i>Avoid taxes when taken or when transferred to estate</i>	<i>Have the security of living in my/our house for my/our lifetime(s)</i>	<i>Make a gift after my/our lifetime, not depleting assets while alive</i>	<i>Make a living trust during my/our lifetime to designate to whom the asset(s) will go</i>	<i>Have extra guaranteed income annually; possibly avoid capital gains</i>
Gift Option	<i>Outright Gift of Cash</i>	<i>Securities</i>	<i>Personal Property</i>	<i>Paid-up Life Insurance</i>	<i>Retirement Plan</i>	<i>Retained Life Estate</i>	<i>Bequest</i>	<i>Living Trust</i>	<i>Charitable Gift Annuity</i>
Description of Gift Option	<i>Cash or check</i>	<i>Stocks, bonds, mutual funds</i>	<i>Your home, a vacation home, commercial property, land, or property related to mission</i>	<i>Paid-up life insurance policy</i>	<i>An IRA, a 401(k), a Keogh plan</i>	<i>Live in your home for your life, transferring ownership upon passing</i>	<i>Make a gift after your lifetime, not depleting assets while alive</i>	<i>Designate any of these in your will with specific wording on how it will be given</i>	<i>A contract between you and D'Youville to pay income for your life (lives)</i>
How do I/we do this?	<i>Simply make a gift via cash or check</i>	<i>Notify your broker of your desired transfer(s)</i>	<i>Donate your property</i>	<i>Name D'Youville as the beneficiary</i>	<i>Name D'Youville as a beneficiary</i>	<i>Name D'Youville as the owner while retaining life residency</i>	<i>Name D'Youville as a beneficiary</i>	<i>Name D'Youville as a beneficiary</i>	<i>Review a calculation based on age and gift amount; sign a contract accepting these terms</i>
How do I/we benefit?	<i>Tax deduction; possible estate tax savings</i>	<i>Full recognition for current value; tax deduction; avoidance of capital gains</i>	<i>Tax deduction based on fair market value</i>	<i>Immediate tax deduction</i>	<i>Reduces estate cost to heirs</i>	<i>Use of your property for life; tax reduction</i>	<i>Your legacy gift is exempt from federal estate tax</i>	<i>The trust is under your control and guidance</i>	<i>Fixed income for life; tax benefits; possible capital gains benefits</i>
How does D'Youville benefit?	<i>Gift now for current needs or restricted use</i>	<i>Gift now for current needs or restricted use</i>	<i>Gift now for current needs or restricted use</i>	<i>Cash in now for current use or held for endowment use</i>	<i>Endowment building gift</i>	<i>Possible use of endowment building gift</i>	<i>Endowment building gift</i>	<i>Endowment building gift</i>	<i>Will receive the remainder value as an endowment building gift</i>
D'Youville Legacy Society Member?	<i>No</i>	<i>Yes, if made as part of your estate plan</i>	<i>Yes, if made as part of your estate plan</i>	<i>Yes, if made as part of your estate plan</i>	<i>Yes</i>	<i>Yes</i>	<i>Yes</i>	<i>Yes</i>	<i>Yes</i>