

GIFTS WE ACCEPT

Choose the Gift Option That Matches Your Goal

An outright gift of cash is quick and simple. However, there are other assets you may consider contributing to your charitable fund at the Community Foundation Tampa Bay that could provide even more tax advantages. Below are the seven most common gift options.

| | Outright gift of SECURITIES | Gift of REAL ESTATE | Gift of RETIREMENT PLAN ASSETS | Shares of PRIVATELY HELD BUSINESS INTEREST | 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 taxation of an IRA or other employee benefit plan. | Transfer ownership while possibly avoiding capital gains. | Make a large gift with little cost to you. | Give your personal residence but retain your current use. | Defer a gift until after your lifetime. |
| Then you can: | Contribute long-term appreciated stock or other securities. | Donate the property to Community Foundation to benefit your charitable fund. | Name your charitable fund as the beneficiary of your retirement plan. | Donate full or partial ownership in a privately held business. | Contribute the ownership of a life insurance policy you no longer need. | Create a charitable gift now, but retain occupancy for life or terms of years. | 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. | Charitable deduction based on fair market value plus possibly eliminate capital gains taxes. | Current income tax deduction. | Tax advantages plus continued use of the property. | Donations exempt from estate taxes. |



We thank you for using the Community Foundation Tampa Bay to assist in your charitable giving. For more information, contact us at info@cftampabay.org or visit our website at cftampabay.org.