



## Goals & Gifts

How will you build the best gift? Whether you want to eliminate taxes or benefit from an increased income stream, there is a gift to fit every objective. No matter how or what you give, rest assured that you will be helping out a cause close to your heart. The following chart details a gift vehicle for every goal. After determining the gift that is right for you, meet with your financial advisor or our organization to begin implementing your wishes.

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Make a quick and easy gift	<b><u>Outright gift</u></b>	Donate cash, securities or personal property	Income tax deduction; avoidance of any capital gains tax

### The following planned gifts would qualify you as a member of the Wilson Society

Make a revocable gift during your lifetime	<b><u>Living trust</u></b>	Name us beneficiary of assets in a living trust	Control of trust for lifetime; possible estate tax savings
Defer a gift until after your lifetime	<b><u>Bequest in Will</u></b>	Name us in your will	A donation exempt from federal estate taxes
Make a large gift with little cost to yourself	<b><u>Life insurance gift</u></b>	Give a policy with us as owner and beneficiary	Current income tax deduction; possible future deductions
Avoid the twofold taxation on retirement plan assets	<b><u>Retirement plan gift</u></b>	Name us as beneficiary of the remainder of the assets after your lifetime	Avoidance of heavily taxed gift to heirs, allowing less costly gifts
Avoid capital gains tax on the sale of a home or other real estate	<b><u>Real estate gift</u></b>	Donate the property to us, or sell it to us at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Give your personal residence or farm, but continue to live there	<b><u>Retained Life Estate</u></b>	Designate the ownership of your home to us, but retain occupancy	Charitable income tax deduction and lifetime use of home
Secure a fixed and often increased income	<b><u>Charitable remainder annuity trust</u></b>	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life
Create a hedge against inflation over the long term	<b><u>Charitable remainder unitrust</u></b>	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase
Supplement income with fixed annual payments	<b><u>Charitable gift annuity</u></b>	Enter a contract with us, in which we'll pay you fixed payments annually	Current and future savings on income taxes; fixed payments for life
Reduce gift and estate taxes on assets passing to heirs	<b><u>Charitable lead trust</u></b>	Create a trust that pays a fixed or variable income to us for a set term, and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes

For more information please contact Bonnie Faulkner, Executive Director Wilson Memorial Hospital Foundation at [bfaulkner@wilsonhospital.com](mailto:bfaulkner@wilsonhospital.com) or (937) 498-5575.

*This information is not intended as financial or legal advice. For financial or legal advice, please consult your financial advisor or attorney.*

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