

CHARITABLE GIFT OPTIONS - DECISION PROCESS

Income Decisions

Assets Decisions

I Want a Fixed Income.

Charitable Gift Annuity

Minimum account recommendation = **\$25,000**

Minimum age = **55**
Maximum age = **65**
Issuable Contract

Charitable Remainder Annuity Trust

Minimum account recommendation = **\$100,000**

I Want a Market-influenced Income.

Charitable Remainder Unitrust

Minimum account recommendation = **\$100,000**

I Want Income to Be Part of My Planned Gift.

Charitable Remainder Unitrust

Minimum account recommendation = **\$100,000**

Charitable Remainder Annuity Trust

Minimum account recommendation = **\$100,000**

I Don't Need an Income.

Charitable Lead Trust

Minimum account recommendation = **\$1,000,000**

Donor Advised Fund

Minimum account recommendation = **\$50,000**

Immediate Charitable Gift

Minimum account recommendation = **\$25,000**

Restricted Giving

Recommend the donor signs a Restricted Gift Agreement which the organization also signs.

I Want to Recover Gifted Assets for My Heirs When I Die.

Charitable Lead Trust

Minimum account recommendation = **\$100,000**

I Want To Donate An Appreciated Liquid Asset As a One-time Gift.

Immediate Charitable Gift

Minimum gift amount recommendation = **\$25,000**
non-cash assets

I Want To Donate An Appreciated Liquid Asset for Many Years

Donor Advised Fund

Minimum account opening value = **\$50,000**