



Wednesday, July 6, 2022

GROW YOUR NEST EGG • PLAN YOUR FUTURE • REACH NEW HEIGHTS

It is possible to achieve all of these goals with some planning.

1. Create Security for You and Your Loved Ones

Did you know there is a way to make a gift to us while creating security for you and your loved ones? It's called a **charitable gift annuity**. It's as simple as transferring your low-performing investments such as CDs and stocks to us in exchange for fixed lifetime payments. You might be surprised at how high your payments could be and your rate will never change.

2. Help Us and Your Heirs

A **bequest** of your IRA funds is one of the easiest ways to help us while also reducing taxes for your heirs. By designating us as the beneficiary of your plan, the full value of your gift will go to help further our work. Rather than facing a high tax burden, your heirs may benefit from estate gifts of low taxed assets such as your home or stock.

3. Grow Your Nest Egg Now and in the Future

Did you know that there is a way to make a gift to us and receive income that could grow over your lifetime? A **charitable remainder unitrust** is an arrangement funded with your cash or appreciated assets. The most common unitrust will pay you income each year based on a percentage of the trust assets. Your income has the potential to increase over time with growth in the trust. This means more income for you and more remaining assets to help us in the future.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375](tel:718-965-7375) x1616 or reply to this e-mail. To help ensure your will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website – www.cfbqlegacy.org.

This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.



[Endowments](#)



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PERSONAL PLANNER

[Do You Have a Difficult Family?](#)

A businessman with a \$2.5 billion estate passed away in 1976. He was single and many individuals, mostly unrelated to him, filed more than 40 wills with the probate court.

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SAVVY LIVING

[How to Hire an In-Home Helper for Parents](#)

I would like to hire an in-home helper for my 82-year-old parent to assist with household chores. However, they do not require personal/physical caregiving, nor do they require any home medical care. Any tips to help us find someone?

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DONOR STORY

[Tax-Free Sale](#)

Howard and Lynn were both age 55 when they purchased some vacant land a few miles outside of town. They thought real estate would be a good investment that could be sold later for a profit.

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WASHINGTON NEWS

[IRS Tax Collection Voice Bots Successful](#)

The IRS is pleased with the rollout of voice bots for tax collections. Darren Guillot, Deputy Commissioner of Collections in the IRS Small Business/Self-Employed Division, stated, "Every day it just gets better and better."

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FINANCES

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Thank you for your interest in planned giving. To access any of our resources, please go to our [website](#).

FREE ESTATE PLANNING GUIDE

It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.



[Download Guide »](#)

PLANNED GIVING CALCULATORS

Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.



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