



Wednesday, March 9, 2022

One of the greatest joys of charitable estate planning is learning all of the ways you can benefit yourself and your family while also providing for the causes important to you. Many people are simply unaware of charitable strategies such as the Charitable Gift Annuity and Charitable Remainder Unitrust that can create new income streams for you and your loved ones.

Both the gift annuity and unitrust feature:

- An income tax deduction at the time your gift is made.
- Capital gains tax avoidance when you make a gift of appreciated assets.
- Flexibility in who you want to benefit and for how long.



CHARITABLE GIFT ANNUITY

A gift annuity is a contract between you and our organization where we agree to make payments to you, you and your spouse or another loved one for life. The payment rate is fixed at the time of funding, which means the payment amount never changes regardless of what the economy does.

CHARITABLE REMAINDER UNITRUST

A unitrust is a special charitable trust set up to pay you and/or your beneficiaries income for life or a number of years. It offers you more flexibility in the assets used and invested, and how the payments (distributions) are made.

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



How to Give



About Bequests

PERSONAL PLANNER

Gifts of Stock

What will the market do this year? Perhaps the best answer is, "It will go up and down." Stock returns vary to a significant degree each year. However, long-term stock returns have been reasonably substantial.

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Driving Tips for Aging Parents

What is the best way to deal with older drivers who probably should not be driving anymore? My dad, who is 86, is determined to keep driving as long as he can.

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DONOR STORY

Part Gift and Part Sale

Susan and Kevin bought a vacant lot along Lake Michigan many years ago. They had planned to build a second home so that their family could spend their summers along the lake.

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WASHINGTON NEWS

Taxpayers Report Gig Income, Cryptocurrency Sales and Foreign Income

In IR-2022-445 the Internal Revenue Service reminded taxpayers that they will need to report three types of income on their 2021 returns.

Taxpayers may have income from working in the gig economy, buying or selling cryptocurrency or may have earned...

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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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