



Wednesday, May 18, 2022

Are you interested in simplifying the management of your charitable giving? Would you like to maximize your income tax savings and minimize capital gains taxes? Would you like to accomplish your current and future charitable giving goals with one simple tool?

If so, consider some of the advantages of using a simple, convenient, versatile means of gifting—the donor-advised fund (DAF), the fastest-growing vehicle for charitable giving in recent years. If you want to learn more about donor-advised funds, contact us.

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.



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PERSONAL PLANNER

[Gift Tax Surprise](#)

Bill: "Every year I pay income tax. And when I pass away my estate will owe tax. But I was absolutely stunned today to hear that I might even have to pay a gift tax! Do you mean that if I give this land to my children, there is yet another tax?"

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What exactly does Medicare cover when it comes to Alzheimer's disease? My spouse was recently diagnosed with early-stage Alzheimer's and we would like to find out what is covered and what is not.

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DONOR STORY

[Give it Twice Trust](#)

While visiting her favorite charity's website, June came across the idea of a give it twice trust. She contacted the charity for more information.

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On May 5, 2022, the Internal Revenue Service published a brief guide on tips to help you prepare for natural disasters. The month of May includes National Hurricane Preparedness Week and National Wildfire Awareness Month.

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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.



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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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