



Gift Planning Calculator

Compare Gift Options

Use the benefits chart to identify the planned gift that best fits your needs.

	Charitable Gift Annuity	Deferred Charitable Gift Annuity	Charitable Remainder Unitrust	Charitable Remainder Annuity Trust	Will or Living Trust	Remainder of Retirement Assets	Outright Gift
I want to receive...							
fixed payments for myself or others	✓	✓		✓			
payments that vary with trust value			✓				
I want the payments to continue...							
for life	✓	✓	✓	✓			
for a term of years			✓	✓			
I want to make a gift...							
during my lifetime	✓	✓	✓	✓			✓
after my lifetime (or upon my death)					✓	✓	
I want to make a gift with...							
cash	✓	✓	✓	✓	✓	✓	✓
appreciated securities	✓	✓	✓	✓	✓	✓	✓
my personal residence			✓		✓		✓
investment real estate			✓		✓		✓
family or closely held business interests			✓				✓
I'm looking for the following tax benefits...							
income tax deduction for charitable gift	✓	✓	✓	✓			✓
reduced capital gains taxes	✓	✓	✓	✓			✓
reduced estate taxes	✓	✓	✓	✓	✓	✓	✓
payments that may be partially tax-free	✓	✓					
help my heirs avoid income taxes						✓	