

# 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 |
|------------------------------------------------------|-------------------------|----------------------------------|-------------------------------|------------------------------------|----------------------|--------------------------------|---------------|
| <b>I want to receive...</b>                          |                         |                                  |                               |                                    |                      |                                |               |
| fixed payments for myself or others                  | •                       | •                                |                               | •                                  |                      |                                |               |
| payments that vary with trust value                  |                         |                                  | •                             |                                    |                      |                                |               |
| <b>I want the payments to continue...</b>            |                         |                                  |                               |                                    |                      |                                |               |
| for life                                             | •                       | •                                | •                             | •                                  |                      |                                |               |
| for a term of years                                  |                         |                                  | •                             | •                                  |                      |                                |               |
| <b>I want to make a gift...</b>                      |                         |                                  |                               |                                    |                      |                                |               |
| during my lifetime                                   | •                       | •                                | •                             | •                                  |                      |                                | •             |
| after my lifetime (or upon my death)                 |                         |                                  |                               |                                    | •                    | •                              |               |
| <b>I want to make a gift with...</b>                 |                         |                                  |                               |                                    |                      |                                |               |
| cash                                                 | •                       | •                                | •                             | •                                  | •                    | •                              | •             |
| appreciated securities                               | •                       | •                                | •                             | •                                  | •                    | •                              | •             |
| my personal residence                                |                         |                                  | •                             |                                    | •                    |                                | •             |
| investment real estate                               |                         |                                  | •                             |                                    | •                    |                                | •             |
| family or closely held business interests            |                         |                                  | •                             |                                    |                      |                                | •             |
| <b>I'm looking for the following tax benefits...</b> |                         |                                  |                               |                                    |                      |                                |               |
| 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                     |                         |                                  |                               |                                    |                      | •                              |               |