

Leaving a Legacy

Planned Giving at UUCPA



Unitarian Universalist Church of Palo Alto

Choose the Gift Option that Matches Your Goals

If your goal is to:	Then you can:	And your benefits are:
Make a quick and easy gift	Write a check today	Charitable income tax deduction
Avoid tax on capital gains	Gift long-term assets	Charitable deduction; no capital gains tax
Keep your financial options open	Make a bequest in your will	Reduced estate, reduced inheritance tax
Protect assets and keep flexibility	Transfer assets to a revocable trust	Full control; reduced estate; no probate
Secure fixed, guaranteed income	Charitable gift annuity	Charitable deduction; guaranteed, partly tax-free income; no market risk
Diversify, avoid capital gains, boost your income	Charitable remainder trust	Reduced estate; charitable deduction; fixed or variable income stream
Protect estate from IRA taxes	Name the church a beneficiary	Reduced estate, reduced inheritance tax
Avoid capital gains tax on home	Donate or transfer to a charitable unitrust	Charitable deduction, reduced estate, reduced inheritance tax, no capital gain tax
Obtain inflation-hedged income	Contribute to a pooled income fund	Charitable deduction, no capital gains tax, inflation-hedged income

For more information:

Visit our web site: http://www.uucpa.org/finance/planned_giving.html
Visit the UUA web site: <http://www.uua.org/giving/giftplans/index.html>
Contact Richard Duda: dick_d@uucpa.org