

Easy Reference Chart

	Bequest	Retirement Assets	Life Insurance	Charitable Remainder Trust	Charitable Lead Trust	Appreciated Securities	Donor Advised Fund
I want to make a gift...							
during my lifetime		•		•	•	•	•
after my lifetime	•	•	•	•		•	•
I want to make a gift with...							
cash	•			•	•		•
appreciated assets	•			•	•	•	•
I want to receive...							
Income payments for myself or others		•		•	•		
I want the income payments to continue...							
for life				•	•		
for a term of years				•	•		
I would like the following tax benefits...							
charitable gift income tax deduction			•	•	•	•	•
reduced capital gains taxes				•	•	•	•
reduced estate taxes	•	•		•	•	•	•
help my heirs avoid income taxes		•					