

| YOUR GIFT | OUTRIGHT GIFT OF CASH | OUTRIGHT GIFT OF SECURITIES OR STOCK | OUTRIGHT GIFT OF PERSONAL PROPERTY | GIFT OF REAL ESTATE | BEQUEST | GIFT OF LIFE INSURANCE | CHARITABLE GIFT ANNUITY * | CHARITABLE REMAINDER TRUST | CHARITABLE LEAD TRUST | GIFT OF RETIREMENT PLAN ASSETS |
|--------------------|---|--|--|---|---|--|---|---|---|---|
| YOUR GOAL | Make a quick gift. Might be matched by an employer. | Eliminate tax on capital gains. | Share your love of your collection or other personal items. | Real estate is no longer needed and generate an income tax deduction. | Defer a gift until after your death. | Make a large gift with few costs to donor. | Supplemental income with fixed and guaranteed payments that may be tax-free. | Secure a fixed and often increased income or create a hedge against inflation. | Reduce gift and estate taxes on assets you pass to next of kin. | Eliminate the twofold taxation on IRAs or other retirement plans. |
| HOW TO MAKE A GIFT | Simply write a check or use a credit card to donate online. 29acres.org/donate/ | Contribute long-term appreciated stock or other securities, including some closely held stock. | Donate tangible personal property. | Convey your real estate, including all or a portion of mineral interests to 29 Acres. | Name 29 Acres in your will or living trust. Designate a specific amount, percentage or share. | Designate 29 Acres as owner of a life insurance policy or name 29 Acres as a beneficiary of all or a portion of the policy. | Contact 29 Acres' Community Engagement Director to transfer cash or assets and sign an agreement. | Create a trust that pays you or others income annually; the remainder later passes to 29 Acres. | Create a trust that pays a fixed or variable income to 29 Acres for a specific term of years, then passes remainder to heirs. | Name 29 Acres as the beneficiary of a portion of the assets after your lifetime. |
| YOUR BENEFITS | Immediate charitable deduction. Removes property from your estate. | Immediate charitable deduction. Eliminate tax on capital gains. | Charitable deduction based on the full fair market value of assets if 29 Acres retains the gift. | Immediate income tax deduction. Reduction or elimination of capital gains tax. | Gift is exempt from federal estate tax. Control your assets during your lifetime. | Possible current or future income tax deductions(s) through gift to pay policy premiums. Remove insurance proceeds from estate. | Current and future savings on income taxes. Fixed lifetime payments to one or two individuals. | Variable or fixed income to named beneficiaries for life. Immediate income tax charitable deduction. | Reduces your taxable estate. Asset, including the increase in value, passes to your family. Reduce or eliminate estate and gift taxes. | Make a gift using the most highly taxed assets. Leave more tax efficient assets to next of kin. |

*Not available in all states or from some organizations.
Adapted from SMU Office of Planned and Endowment Giving.

