

## Charitable Instruments

A variety of **giving methods** tailored to your unique situation.



**Outright Gift.** You can make a gift of cash, stocks, bonds, real estate, or other assets to the Door County Community Foundation. Your gift qualifies for maximum charitable benefit under state and federal law.

**Bequest.** You can designate a gift or portion of your estate to the Door County Community Foundation and, very often, receive a substantial reduction in federal gift and estate taxes.

**Charitable Remainder Trust.** You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to the Door County Community Foundation, and is placed in a charitable fund you've selected. You receive income tax benefits the year you establish your trust.

**Charitable Lead Trust.** You can place cash or property in a trust that pays a fixed amount to the Door County Community Foundation for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In most cases, you receive a substantial reduction in federal gift and estate taxes.

**Gift of Non-Cash Assets.** You can give publicly traded stock, artwork, or other assets that have financial value through any of the gift vehicles noted above. By donating a highly appreciated non-cash asset, you also typically avoid paying taxes on their capital gains.

**Gifts of Real Estate & Closely Held Stock.** Contributions of these kinds of assets to the Door County Community Foundation (a 501(c)(3) public charity) normally entitle you to deduct their fair market value. The same gift to a private foundation typically is limited to its cost basis - what you paid for the asset. The Door County Community Foundation is the ideal vehicle to facilitate almost every kind of charitable giving.

## You receive personalized service.

Each individual, family, or organization we work with has unique charitable interests...and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.

