

Advisor Tool K.I.T.

Knowledge. Inspiration. Tools.



YORK COUNTY COMMUNITY FOUNDATION

May 22, 2007

FIVE Clues.

You may have clients who approach you with a problem that charitable giving can answer. Here are five clues your client may be giving you:

Your client says:

1. "I want to sell appreciated property, but I'm concerned about capital gains taxes."

Giving all or part of the asset to charity will eliminate or reduce capital gains taxes and can replace less efficient charitable giving, continue or begin to provide lifelong income, and/or provide satisfaction about supporting a charity of one's choice.

2. "I'll be receiving additional taxable income this year. I'd like to give some to a charity, but I'm not ready to decide which one."

A donor-advised fund will lock in a tax deduction for the current year and allow as much time as is needed to choose the charity.

3. "I have a large retirement fund but my children will only receive 20 or 30 cents on the dollar."

Giving the retirement fund to an endowment from which heirs may recommend charitable gifts will reduce estate tax, eliminate income tax on the IRA distribution, and create a family legacy. In the meantime, other assets can be used for gifts to family members.

4. "I have no children, and it's time to write a will."

How do they want to be remembered? Suggest a charitable fund at the Foundation as a way to be remembered support charity and as an alternative to paying too much estate tax.

5. "I'd like to help a long-time employee (or friend, sibling, or parent)."

A life-income gift, such as a Gift Annuity, will assure the friend a lifetime income -- and allow your client to support a favorite charity following the friend's death.



*Your client can give like **Rozella Olp Anstine**. She passed away in 1976, but she supported the annual arts and drama awards program, *The Rosies*, at the Strand on Sunday night. How? Through the **Rozella Olp Anstine Fund for Music and Art** of the Community Foundation.*

Discover us at www.yccf.org, your Center for Philanthropy on the web for more charitable giving options.

Contact Information

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