

CHOOSE THE PLANNED GIFT OPTION
THAT MATCHES YOUR GOALS

YOUR GIFT	Bequest	Revocable Living Trust	Gift of Life Insurance	Gift of Retirement Assets	Gift of Real Estate	Retained Life Estate	Charitable Remainder Unitrust	Charitable Remainder Annuity Trust	Charitable Gift Annuity
YOUR GOAL	Defer a gift until after your lifetime	Make a revocable gift during your lifetime	Make a large gift with little cost to you	Avoid the twofold taxation of IRAs or other employee benefit plans	Avoid capital gains tax on the sale of a home or other real estate	Give your personal residence or farm now but continue to live there	Create a hedge against inflation over the long term	Secure a fixed and often increased income	Supplement income with a guaranteed, fixed amount that is partially tax free
HOW TO MAKE THE GIFT	Name Hospice Foundation in your will (designate a specific amount, a percentage or a share of the residue)	Name Hospice Foundation the beneficiary of assets in a living trust	Contribute a life insurance policy you no longer need and/or name Hospice Foundation as beneficiary	Name Hospice Foundation as the beneficiary of the remainder of the assets after your lifetime	Donate the property to us	Designate ownership of your home to us, but retain occupancy	Create a trust that pays a fixed percentage of trust's assets as revalued annually	Create a charitable trust that pays you a set income annually	Enter a charitable gift annuity contract with us that pays a guaranteed income annually
YOUR BENEFITS	Donation is exempt from federal estate taxes	You maintain control of the trust for your lifetime	Current income tax deduction and possible future deduction through gifts to pay the policy premiums	Allows less costly assets for your heirs	Immediate income tax deduction and a reduction or elimination of capital gains tax	Valuable charitable income tax deduction and a lifetime use of your residence	Receive a variable income for life and an immediate income tax charitable deduction	Immediate income tax deduction and a fixed income for life, often at a higher rate of return	Current and future savings on income taxes as well as a stable income for life

NOTE: This chart is provided for guidance only. It does not purport to provide professional advice. We encourage you to consult your legal and financial professional advisors to learn what options might work best for you.

Please contact Hospice Foundation for additional information about charitable planned giving. We would be pleased to work with you and your advisors.



Please use the following when referencing Hospice Foundation in your estate planning documents

Hospice Foundation
PO Box 1798
Monterey, CA 93942-1798
831-333-9023
Tax ID 94-2404634