



| Asset | Age (typical) | Amount | Associated benefits (subject to limitations) |
|---|---------------|-----------------|--|
| Cash | Any age | Any amount | Tax deduction |
| Appreciated stock | Any age | Any amount | Tax deduction, no capital gains tax due |
| Donor-advised fund grant | Any age | Any amount | Tax deduction (at the time the assets are contributed to the fund, not at the time the grant is made) |
| Gift in your will | Any age | Any amount | Flexibility—pay nothing now, reduce the size of your estate later |
| Beneficiary designation | Any age | Any amount | Flexibility—pay nothing now, reduce the size of your estate later |
| Gift to an existing legacy fund | Any age | Any amount | Tax deduction, support meaningful program or area well into the future |
| Cryptocurrency | Any age | Any amount | Tax deduction, no capital gains tax due |
| Deferred charitable gift annuity | 45+ | \$15,000+ | Tax deduction, income stream for yourself and/or someone else that begins at least a year in the future, tax benefits if funded with appreciated stock |
| Charitable gift annuity | 55+ | \$15,000+ | Tax deduction, income stream for yourself and/or someone else that begins immediately, tax benefits if funded with appreciated stock |
| Real estate | 55+ | \$100,000+ | Tax deduction, no capital gains tax due |
| Business interest | 55+ | \$100,000+ | Tax deduction, no capital gains tax due |
| Charitable remainder trust | 55+ | \$100,000+ | Tax deduction, no capital gains tax due, income stream for you and/or your named income beneficiaries |
| Charitable lead trust | 55+ | \$100,000+ | Reduction in gift and estate taxes, no tax due on any appreciation of trust assets |
| Life insurance | 70+ | \$100,000+ | Tax deduction if you make a gift of a policy, flexibility if you make a gift using a beneficiary designation. |
| Gift from an IRA (outright) | 70½+ | Up to \$111,000 | No tax is due on the distribution, which counts toward your RMD |
| Gift from an IRA (life income) | 70½+ | Up to \$55,000 | No tax is due on the distribution, which counts toward your RMD, and you create an income stream for yourself and/or your spouse |
| Blended gift | Any age | Any amount | Combine two or more gifts to meet your charitable goals and provide the benefits you desire |