

Planned Giving

Is making a difference important to you?

Are you concerned that the causes and organizations you care about today will continue to thrive in the future?

The good news is you don't have to be Andrew Carnegie or Bill Gates to start a meaningful philanthropic legacy. In addition to supporting the work of your favorite organizations through cash donations, consider making a planned gift.

If Charitable giving is an important part of your life and your core values? You can create YOUR OWN legacy!

Contact us at 626-791-1611 or email us at info@amigosdelosrios.org for more information on Amigos De Los Rios Planned Giving program.

What is planned giving?

Planned giving is a win-win approach to philanthropic donations that supports your favorite nonprofit organization and can benefit you now or in the future. Have you ever made a vehicle donation to benefit your favorite charity? If you have, you know that transferring assets is easy and it can provide tax benefits as well.

Simply put, "planned giving" is the transfer of assets to a designated nonprofit organization during a lifetime or as part of an estate plan. This forward-thinking approach to giving is "planned" because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

It's easy.

Planned giving is easy to do and you don't have to be wealthy to do it. Whether it is naming your favorite charity in your will or trust for a modest amount, or a gift of house and property, there is an easy option that is right for you.

It can involve assets you might never think of. A life insurance policy. Real estate. Stocks. Business holdings. A checking or savings account.

These are all assets that can be leveraged in planned gifts. It can generate an income stream.

In return for the donation of real estate, stocks or other assets, donors can receive a series of regular payments.

It can provide generous tax benefits.

Depending upon the type of gift, short-term and/or long-term tax benefits may apply. Donors at a variety of income levels can benefit. Be sure to consult with your financial or estate planner for more specifics.

It can work in tandem with other family priorities.

Planned giving is not an "all or nothing" option. Gifts can exist side-by-side with other beneficiaries and personal priorities.

It is long remembered.

Designating a planned gift automatically makes you a member of the organization's legacy society.

Legacy society members often receive immediate recognition on an organization's website, in publications and receive invitations to special events.

In addition to the satisfaction of making a meaningful gift, most planned gifts have immediate and/or long-term tax

benefits. The chart below can help you find the type of gift that is right for you.

For more information on Planned Giving call us at 626-791-1611 or email us at info@amigosdelosrios.org or consult with your financial advisor or estate planner.