



PLANNED GIVING OPTIONS

CHOOSE A GIFT THAT FITS YOUR NEEDS

When it comes to giving a gift to TMU, you have a lot of options. Some of these options are familiar to you. Others may be new.

The giving option that is right for you depends on your goals and present needs.

The chart on the following page summarizes the benefits of our most common giving strategies and focuses on planned gifts. A planned gift is one that is funded through a portion of your estate.

Together with your legal and financial advisors, our development officers can help you choose a gift that matches your intentions and maximizes your tax benefits. Contact us to discuss how you can help further the vision of TMU.

**WE CAN HELP YOU
SELECT THE BEST
GIVING OPTION FOR
YOUR SITUATION.**

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	TYPE OF GIFT	BENEFITS
GIFTS THAT PAY YOU INCOME	CHARITABLE GIFT ANNUITY	<ul style="list-style-type: none"> • Fixed income payments you can depend on for life • Income tax deduction in the year of gift • Part of each payment is tax-free
	CHARITABLE REMAINDER TRUST	<ul style="list-style-type: none"> • Payments for life or a term of years • Income tax deduction in the year of gift • Preserves value of assets used to fund, since no initial capital gains tax
GIFTS TMU CAN USE TODAY	OUTRIGHT GIFT (e.g., cash, stock, securities, other property)	<ul style="list-style-type: none"> • Income tax deduction in the year of gift • See the impact of your gift to TMU now
	CHARITABLE LEAD TRUST	<ul style="list-style-type: none"> • Assets pass on to your family, keeping the property in your family • See the impact of your gift to TMU now
GIFTS THAT TMU CAN USE IN THE FUTURE	BEQUESTS (i.e., gifts through will or trust)	<ul style="list-style-type: none"> • Most popular option • Defer a gift until after your lifetime and designate your property as you desire • May reduce taxable estate • Allows you to leave a legacy gift
	LIFE INSURANCE DESIGNATION	<ul style="list-style-type: none"> • Allows you to make a gift with policy proceeds • Possible tax deductions and may reduce taxable estate
	RETIREMENT PLAN DESIGNATION	<ul style="list-style-type: none"> • Avoids taxation of built up gains