

# I WANT TO MAKE A DIFFERENCE

## A GUIDE TO GIVING OPTIONS

**START  
TODAY**

**LIQUID  
ASSETS**

Writing a check or donating online is the simplest way to get started. However, we encourage you to consult your tax professional on ways to maximize the benefits of giving.

**PUBLICLY TRADED  
SECURITIES**

Gifting appreciated securities, like stocks or bonds, may provide you with significant tax advantages including an immediate deduction, avoidance of capital gains taxes and a reduction in estate taxes.

**IRA ROLLOVER**

Gifting your required minimum distribution, or more, with no tax consequence to certain fund types is available for those who qualify.

**REAL ESTATE**

When you donate a gift of real estate – vacation home(s), income property or land – you receive an immediate tax benefit, avoid capital gains and receive a reduction in estate taxes.

**PLAN FOR  
TOMORROW**

**YOUR  
ESTATE  
PLAN**

You can designate the Hamilton Community Foundation as a beneficiary in your will with a specific dollar amount or as a percentage of your estate. This is perhaps the easiest and most impactful way to support your community in perpetuity.

**RETIREMENT PLAN  
ASSETS**

A retirement asset like an IRA account makes an excellent bequest. If the IRA were given to your family, much of the value would be depleted through estate and income taxes. By designating the Hamilton Community Foundation as the beneficiary, the full value of the gift is transferred tax free.

**LIFE INSURANCE**

This option provides a simple way to add to or create your charitable fund. Simply name the Hamilton Community Foundation as the beneficiary and/or owner of the policy.

**PLANNED GIFTS**

Charitable gift annuities and trusts are options that create your philanthropic legacy and provide income to you and your heirs.

# I WANT TO SUPPORT...

## A GUIDE TO CHOOSING YOUR FUND AT THE FOUNDATION

**THE MOST PRESSING  
NEEDS IN OUR COMMUNITY**

### **UNRESTRICTED FUND**★

This fund allows the Foundation Board of Trustees to award grants to the most pressing needs in our community.

**CAUSES & NONPROFITS THAT  
ARE MEANINGFUL TO ME**

### **DONOR ADVISED FUND**

This flexible fund allows you to be actively involved in your philanthropy and has key advantages: convenient tax advantages, and no required annual distribution.

**A SPECIFIC CAUSE OR  
NONPROFIT THAT IS  
IMPORTANT TO ME**

### **DESIGNATED FUND**★

This fund provides for annual support to a nonprofit or cause you specify. If for any reason, the organization ceases to exist or the mission changes, we will protect your intent forever.

**A SPECIFIC ISSUE THAT  
I CARE ABOUT**

### **FIELD OF INTEREST FUND**★

This fund allows you to provide annual support to a specific cause or program important to you. Examples include children, the arts, healthcare, animals, or beautification in our community.

**EDUCATION**

### **SCHOLARSHIP FUND**★

This flexible fund provides a way for you to give the gift of education. You may provide tuition assistance for students who resonate with you, whether they are part of parochial schools, in preschool, graduating high school seniors, currently in college, or adults returning to school.



denotes fund types which qualify for the IRA charitable roll over from retirement accounts.



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