
CHARITABLE GIVING



BRIDGING THE GAP SEPTEMBER 2025

WHAT IS CHARITABLE GIVING?

The act of voluntarily giving something of value—like money, time, or assets—to help others or support a cause, without expecting anything in return.



VOLUNTARY



PURPOSEFUL



NOT-FOR-PROFIT

Learning about Charitable Giving

It's not just about money

It combines heart and head

There are many paths to give

Giving can be personalized

The impact is measurable

Tax and financial benefits can make a difference

Learning about giving can influence behavior

Giving teaches gratitude and perspective

Direct Gifts

Cash

Check

Credit
card

Online

In-kind

Gifts of Assets



APPRECIATED
SECURITIES



REAL ESTATE



BUSINESS
INTERESTS



CRYPTOCURRENCY



PERSONAL
PROPERTY

Planned Gifts

Bequests

- Wills
- Estates

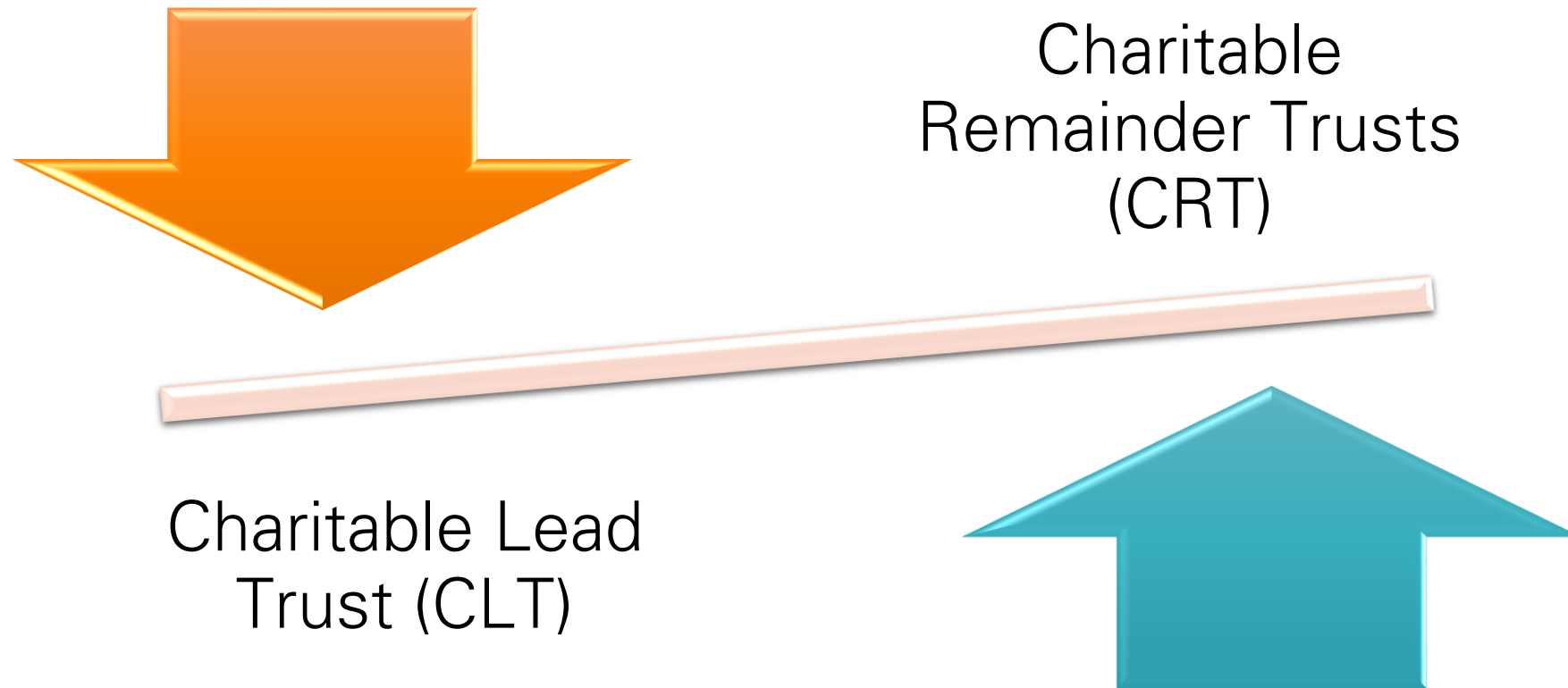
Beneficiary Designations

- Life Insurance
- Annuity

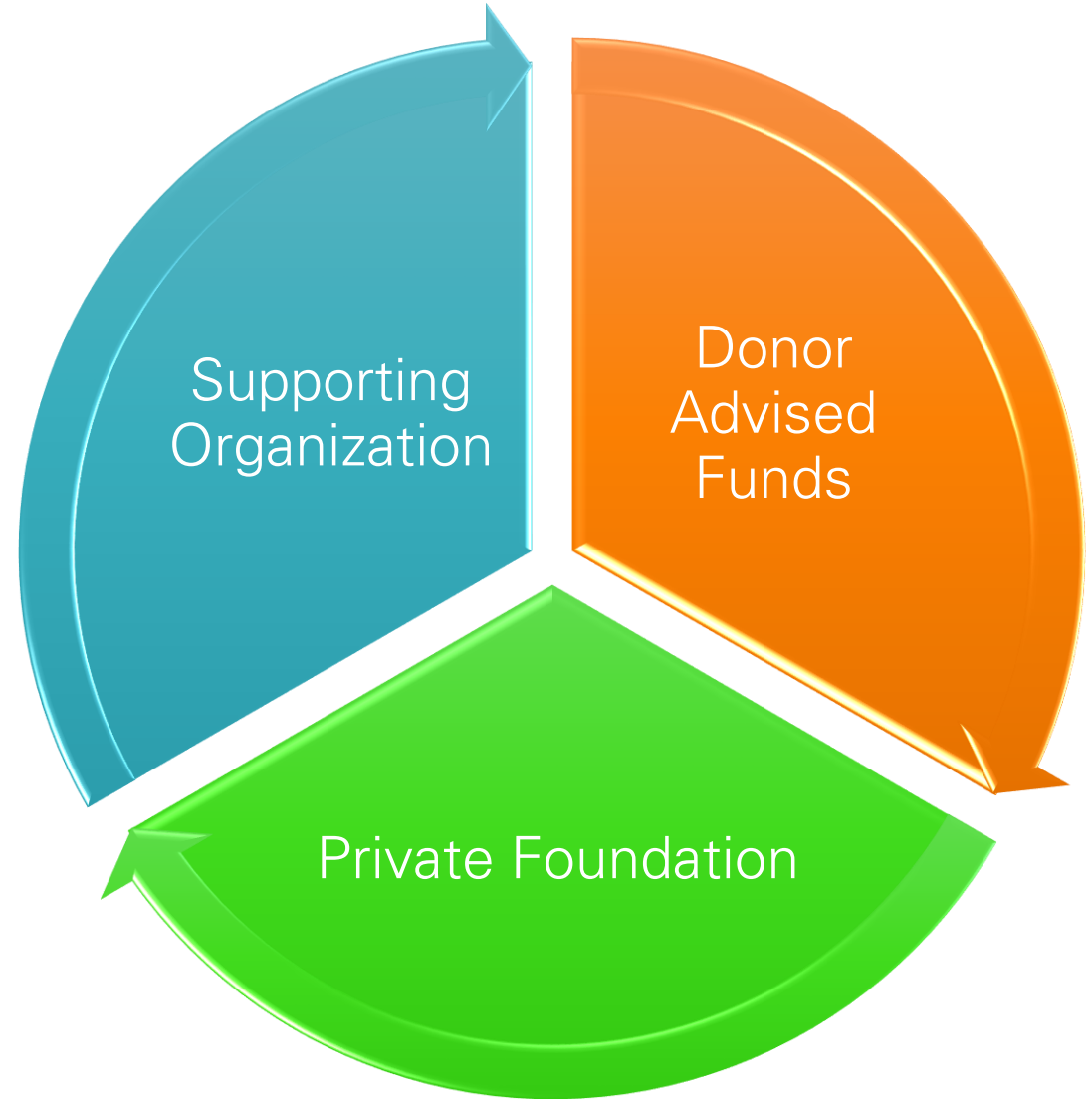
Retirement Plan Gifts

- IRA/ 401K
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Charitable Trusts



Giving Vehicles



Life Income Gifts



Charitable Gift Annuities

Fixed payments for life, charity keeps what's left



Pooled Income Fund

Fund managed by charity, gets income, charity keeps remainder

Endowment Gifts



Other Creative Gifts

Qualified Charitable Distributions (QCD)

Matching Gifts

Volunteer Service with Stipends Donated Back

Cause-related Business Gifts

Overview



Questions?

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