



Goals & Gifts Reference Chart

Whether you want to eliminate taxes or benefit from an increased income stream, there is a gift to fit every objective. And no matter how or what you give, rest assured that you will be helping a cause close to your heart. The following chart details a gift vehicle for every goal. For complex vehicles, we suggest that you meeting with your financial advisor to determine which vehicle is right for you. Thank you for considering a gift to Shelter Network. If you should have questions or comments, please feel free to contact us at (650) 685-5880.

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Make a quick and easy gift	Outright gift	Donate cash, securities or personal property	Income tax deduction; avoidance of any capital gains tax
Make a revocable gift during your lifetime	Living trust	Name Shelter Network as a beneficiary of assets in a living trust	Control of trust for lifetime; possible estate tax savings
Defer a gift until after your lifetime	Bequest in will	Name Shelter Network in your will	A donation exempt from federal estate taxes
Make a large gift with little cost to yourself	Life insurance gift	Give a policy with Shelter Network as owner and beneficiary	Current income tax deduction; possible future deductions
Avoid the twofold taxation on retirement plan assets	Retirement plan gift	Name Shelter Network as beneficiary of the remainder of the assets after your lifetime	Avoidance of heavily taxed gift to heirs, allowing other, less costly gifts, to heirs
Avoid capital gains tax on the sale of a home or other real estate	Real estate gift	Donate the property to Shelter Network, or sell it to us at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Give your personal residence or farm, but continue to live there	Retained life estate	Designate the ownership of your home to Shelter Network, but retain occupancy	Charitable income tax deduction and lifetime use of home
Secure a fixed and often increased income	Charitable remainder annuity trust	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life
Create a hedge against inflation over the long term	Charitable remainder unitrust	Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase
Supplement income with fixed annual payments	Charitable gift annuity	Enter a contract with Shelter Network, in which we'll pay you fixed payments annually	Current and future savings on income taxes; fixed payments for life
Reduce gift and estate taxes on assets passing to heirs	Charitable lead trust	Create a trust that pays a fixed or variable income to Shelter Network for a set term, and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes