

Charitable Gift Annuity

- Make an irrevocable donation to BGCC and receive fixed and guaranteed annual payments for the rest of your life at an attractive rate.
- You may receive an income tax deduction. You may also realize capital gains tax savings on gift annuities funded with stocks, bonds or mutual funds that have appreciated in value.

Charitable Remainder Trusts

- A Charitable Remainder Trust (CRT) is a tax-free trust that pays you and/or other beneficiaries an annual distribution. This payment is either a percentage of the annual value of the trust, or a percentage of the original gift amount. While donating real estate is the most common way to fund a charitable trust, a wide variety of assets can be used, including appreciated publicly traded or closely held stock, as well as oil, gas or mineral interests.
- You receive a charitable income tax credit for the charitable portion of the trust.



Please keep in mind that this is not an exhaustive list of tax-wise giving options, but rather some examples to get you started. Our team would be happy to help you identify the type of gift that will best meet your goals and make the biggest impact possible.

I'm Here to Help



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This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain the services of another qualified professional.

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BOYS & GIRLS CLUBS
OF CHICAGO



Tax-Wise Ways to
Make an Impact



Smart Ways to Empower Chicago's Children

Your generous support helps ensure that every child has the chance for a brighter future — one filled with opportunity and self-confidence. With tax-wise giving strategies, you can make an even bigger impact on our mission and empower the youth of today to reach their full potential. You can make a difference in the lives of countless deserving children, and give them the resources needed to enjoy their childhood and thrive in adulthood.

Options that Fit Your Goals

This chart can help you identify gifts that are aligned with your personal goals. You can learn more about each giving opportunity on the following pages.

Your Goal	Gift Options
Reduce or defer income taxes	Bequest, retirement plan gift, real estate and charitable remainder trust
Reduce or eliminate capital gains taxes	Bequest and charitable remainder trust
Lower estate taxes for your loved ones	Bequest, beneficiary designation, charitable remainder trust and real estate

Gifts by Bequest

- You name Boys & Girls Clubs of Chicago (BGCC) as a beneficiary in your will or living trust, designating the gift of your choice (for example, cash, real estate or securities).
- You maintain complete control of your assets during your lifetime, and can save on income taxes, capital gains taxes and estate taxes.

Name BGCC as Your Beneficiary

- Request a change of beneficiary form from the organization holding your assets (for example, your IRAs, 401(k) and other retirement plans, bank accounts, commercial annuities, life insurance policies and other assets) and include BGCC as a full or partial beneficiary.
- You reduce income taxes and possibly estate taxes for your loved ones.

Retirement Plan Gift

- If you are 70½ or older, you can transfer funds directly from your IRA to BGCC via a Qualified Charitable Distribution.
- If you are 73 years of age or older, this gift may count towards your Required Minimum Distribution thereby reducing your taxable income.