



# WINTER HAVEN HOSPITAL FOUNDATION

## Ways to Give

|                | OUTRIGHT GIFTS  |  | BENEFICIARY DESIGNATIONS  |  |  | PROPERTY  | INCOME - PRODUCING   |  |
|----------------|---|--|---|--|--|---|--|--|
| YOUR GIFT      | CASH  | SECURITIES   | BEQUEST or REVOCABLE LIVING TRUSTS  | LIFE INSURANCE POLICIES  | RETIREMENT ASSETS  | REAL ESTATE or PERSONAL PROPERTY  | CHARITABLE GIFT ANNUITY or REMAINDER TRUSTS  | CHARITABLE LEAD TRUSTS   |
| YOUR GOAL      | Make a straight-forward and simple gift   | Eliminate capital gains tax on appreciated securities  | Defer a gift until after your lifetime and retain the right to modify your decision                                     | Leverage charitable dollars into a larger benefit to WHHF  | Make a gift today with no out-of-pocket expenses<br><br>Eliminate two-fold taxation on retirement assets                                     | Remove an asset of real or personal property from your estate or corporate holdings   | Secure a regular income stream for you or a loved one, for now or in the future                            | Reduce gift and estate taxes on assets you wish to pass to children or grandchildren                   |
| YOUR NEXT STEP | Simply write a check or make a pledge for up to five years<br><br>No minimum                          | Contribute long-term appreciated stock or other securities to WHHF<br><br>No minimum                                 | Name WHHF as a beneficiary in your will or trust<br><br>Document the gift with WHHF<br><br>No minimum                   | Name WHHF owner and beneficiary of a new or existing life insurance policy*<br><br>Minimums apply                | Name WHHF as a beneficiary of your IRA, 401k, 403b, or other retirement asset<br><br>No minimum  | Donate the asset outright, as a bargain sale, or in a retained life estate (real property)**<br><br>No minimum                                  | Establish a gift annuity with WHHF or create a trust that distributes annual income<br><br>Minimums apply  | Create a trust that pays an income to WHHF for a specified term of years<br><br>Minimums apply         |
| YOUR BENEFITS  | Claim an income tax deduction each year a gift is made<br><br>Witness the benefits of your generosity | Earn a charitable deduction of the fair market value<br><br>Eliminate capital gains tax<br><br>See your gift at work | Maintain control of your assets<br><br>Reserve the right to make changes<br><br>Donation exempt from federal estate tax | Possible income tax deduction for premiums paid<br><br>Make a greater impact than you could during your lifetime | Maintain control of your assets over your lifetime<br><br>Eliminate or reduce income and estate taxes on the asset upon distribution to WHHF | Benefits may include: Earn an income tax deduction<br><br>Reduction or elimination of capital gains tax<br><br>Reducing the size of your estate | Payments for life or a term of years<br><br>Immediate income tax deduction and possible future tax savings | Reduces your taxable estate<br><br>Property can transfer to your family, often with reduced gift taxes |

\* Subject to WHHF guidelines and Board approval

\*\* Subject to appraisal and Board approval