



Round Rock Area
Serving Center

LIFTING HANDS & HEARTS

A CAMPAIGN OF CARING

WAYS TO GIVE

Donor's Goal	Gift Vehicle	How to Make the Gift	Benefits to the Donor
Make a quick and easy gift	Cash	Write a check; use a credit card or set up a recurring payment	Income tax deduction
Make a quick and easy gift	Transfer of Stock	Using the stock transfer form, transfer stock directly to the Serving Center	Income tax deduction and avoidance of capital gains tax
Contribute to a fund held by a charitable sponsor and receive an immediate tax benefit while not expending the funds until later	Donor Advised Fund (DAF)	Donor recommends a gift be made to charitable sponsor where DAF is held	Have charitable assets professionally managed and distributed to organizations. Often the simplest and least expensive way for donors to make a gift of appreciated assets (stocks, real estate, etc.)
Make a gift of your retirement savings	401(k) or IRA required minimum distributions	If you don't need some or all of the income from your retirement accounts, consider using some of your required distributions to fund your gift	This option is available to donors of 70.5 years and older and can have significant tax benefits
Reduce gift and estate taxes on assets passing to heirs	Bequest	Designating the Serving Center as a beneficiary of your estate and a recipient of a specific or partial bequest	Retain the freedom to live with your current income and make the legacy gift that you desire
Make a large gift with little cost to yourself	Life Insurance Gift	Give a policy with the Serving Center as owner and beneficiary	Current income tax deduction; possible future deductions
Create and/or increase income from assets	Charitable Gift Annuity	Create a charitable annuity that pays you a set income annually	Immediate income tax deduction and fixed income for life; remainder of the corpus passes to the Serving Center
Create and/or increase income from assets; create a hedge against inflation over the long term	Charitable Remainder Trust	Create a trust that pays you a fixed or variable percentage of the trust's assets; valued annually	Immediate income tax deduction; annual income for life that has potential to increase; remainder of the corpus passes to the Serving Center
Reduce gift and estate taxes on assets passing to heirs	Charitable Lead Trust	Create a trust that pays the Serving Center a fixed or variable income for a set term, and the remainder passes to your heirs	Reduced size of taxable estate; keeps asset in family with reduced tax ramifications
Give your personal residence or farm but continue to live there	Retained Life Estate	Transfer the deed of your qualifying home to the Serving Center but retain occupancy	Charitable income tax deduction and lifetime use of home