

Charitable Bequest

A Charitable Bequest is one of the easiest ways to support a ministry you care about.

Benefits of a Charitable Bequest

FLEXIBILITY. You can leave a bequest of a specific dollar amount, a percentage of your estate or even a specific asset, such as a retirement account.

EMPOWERING. With a bequest, you retain full ownership and control of your assets during life — you can use your assets as you see fit and can even sell the asset if you need to.

STRATEGIC. Bequests can

help you establish priorities. You can name a loved one as a primary beneficiary, but if that person is no longer living, your estate plan could leave the asset to our organization as a contingent beneficiary.

TAX SAVINGS. If your estate will be subject to estate taxes, a charitable bequest will reduce the amount of tax due, including by generating a charitable estate tax deduction.



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LEARN MORE

We provide free resources to help you learn more about charitable bequests and sample bequest language to provide to your attorney, we offer several free resources at [giftplanning.com](https://www.giftplanning.com)

The Charitable Bequest Process



1

Gift of
Asset



2

Will or
Trust



3

Asset to
Ministry



Objective

You want to make a gift to our organization but are looking for a way to give that provides you with flexibility if your needs change.



Solution

The right solution could be a charitable bequest. You can establish a gift in your estate plan today while preserving your savings for tomorrow.



Benefits

With a bequest, you can support the causes you care about while saving on potential estate taxes and retaining assets to meet your future needs.