

WAYS TO SUPPORT THE CAMPAIGN

THE CAPITAL CAMPAIGN FOR LUNCH BREAK



MONETARY GIFTS

Your monetary gift – be it cash, check, or credit card – is the simplest method of giving, and not subject to gift or estate taxes. Monetary gifts are immediate and impactful and, as such, are always greatly appreciated. Personal checks, cash and credit/debit cards are all accepted, affording donors an income tax deduction during the year in which the gift is made. Larger donations can be pledged over time to complement charitable tax objectives. Lunch Break prefers that these commitments be completed within three years.

Donors can use our binding Pledge Form to indicate their payment method, the anticipated timing of their pledge payments, and any other necessary information. Checks should be made out and mailed to:

Lunch Break
Attention: Gwendolyn Love, Executive Director
121 Drs James Parker Blvd
Red Bank, NJ 07701

GIFTS OF APPRECIATED SECURITIES

Donating long-term appreciated securities — rather than selling the assets and then donating the cash proceeds — is another beneficial way to give. Appreciated, publicly traded securities (e.g., readily marketable stocks or bonds) may have important tax benefits for donors.

Lunch Break maintains an account for the transfer of securities. For further information, please contact the Development Office.

PLANNED GIFTS

While Lunch Break prefers to fulfill our campaign needs by gifts of unrestricted cash or securities, other forms of giving – such as irrevocable trusts or deferred giving – can be attractive options for donors, enabling them to significantly increase the level of their gifts. A transfer of assets to a gift or trust entity that pays income to a named beneficiary – or even shifts assets to heirs – may allow a donor to make a substantial gift to Lunch Break, while also meeting personal financial objectives. A donor may gain immediate tax advantages or may reduce gift or estate taxes through one of these gift arrangements.

Bequests are another popular option to benefit Lunch Break and to perpetuate charitable support well beyond a lifetime. Donors can also support and include Lunch Break in their wills. Please contact the Development Office for more information about all planned giving options.

We understand that planning a gift to Lunch Break takes careful consideration and evaluation. Lunch Break provides limited financial planning guidance and counsel regarding the options for deferred giving. Donors are advised to consult with their financial planners or legal advisors to evaluate plans that best fit their financial situations.

For the most effective results, we invite prospective donors to meet with our Executive Director and Development Officer to discuss charitable intentions. This will assure donors' families that their gifts will be used in accordance with the donor's exact wishes.

MATCHING GIFTS

A company's matching program could double or even triple a gift to Lunch Break, while the donor is acknowledged for the full value of the gift. For example, if a donor gives \$5,000 to Lunch Break, a company's matching program will also donate \$5,000, acknowledging the donor with a \$10,000 gift. Some companies may even match gifts on a 2:1 or 3:1 ratio. Donors should contact the Human Resources Departments of their respective companies to obtain the appropriate documentation, which should be forwarded along with their gift. Lunch Break's Development Office will be able to take care of the rest.

Gifts of real estate/tangible property may be donated outright. In this instance, an immediate tax deduction is available and capital gains taxes may be avoided. Such gifts may only be accepted upon approval of the Board of Trustees.

Donors should consult their financial advisors about specialized gift techniques, as they vary based on individual circumstances.

PLANNED GIVING GOALS & BENEFITS

There are many customized ways to donate to Lunch Break. Please consider how different options will help you to achieve different goals and, of course, please contact us with any questions.

YOUR GOAL	YOUR GIFT	YOUR METHOD	YOUR BENEFIT
Honor someone special with a tribute gift that costs you nothing during your lifetime	Bequest: a gift through your will or trust	Include a gift of cash, property, or a share of your estate through your will or trust	Make a significant gift that does not affect your cash flow and can be changed down the road
Make a gift while leaving more of your estate to your heirs	Gift of Retirement Assets	Name Lunch Break as a beneficiary of your retirement plan	Avoid up to 60% income tax on your retirement assets, and potentially minimize taxable assets to your heirs.
Make a gift while avoiding capital gains liability	Gift of Appreciated Securities	Transfer stocks, bonds or mutual fund shares to Lunch Break	Receive an immediate income tax deduction without any capital gains tax
Leverage an asset to make a significant gift	Gift of Real Estate	Deed property to Lunch Break and continue to use it for as long as you wish	Avoid capital gains tax, while receiving an income tax deduction that does not affect your lifestyle
Make an extraordinary gift at minimal cost to yourself	Gift of Life Insurance	Name Lunch Break as a beneficiary on an existing policy or donate a life insurance policy you no longer need	Take a tax deduction and possible future deductions through gifts to pay policy premiums
Make a future gift and secure extra cash flow	Charitable Gift Annuity Charitable Remainder Trust Charitable Lead Trust	Share your assets with Lunch Break in a plan that gives you guaranteed payments and supports the Lunch Break mission	Receive tax advantaged payments for life, along with a large charitable tax deduction