



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 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
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

CONTACT LUNCH BREAK WITH QUESTIONS.

EMAIL JILL GWYDIR, DIRECTOR OF DEVELOPMENT AT JGWYDIR@LUNCHBREAK.ORG

Consult your own tax advisor as to the tax consequences associated with your plan. Tax rules governing options are complex, change frequently and depend on the individual taxpayer's financial circumstances.