

**YMCA of Mratha's Vineyard
Philanthropic Guide**

| | HOW TO MAKE YOUR GIFT | YOUR BENEFITS | YMCA BENEFITS |
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| CASH | Write a check to the YMCA or charge your gift to a credit card here . | See the immediate impact of your gift at the YMCA. For tax purposes, if you itemize, you will | The YMCA is able to use your gift to immediately meet current needs in the area you designate. |
| SECURITIES | For securities held in a brokerage account, certificate form or mutual fund shares, the YMCA can provide you with the necessary information to | See the immediate impact of your gift at the YMCA. For tax purposes, if you itemize, you can deduct the full fair market value of the securities. | The YMCA is able to use your gift to immediately meet current needs in the area you designate. |
| DONOR ADVISED FUND | Establish a donor-advised fund through one of the YMCA's public charity partners. | Make grants to the YMCA and other charities on your own timeline, and promote the value of philanthropy within your family. Receive an immediate tax deduction. Possible savings on | You can request annual grants from your donor advised fund to support the YMCA and name the YMCA a remainder upon your passing. |
| BEQUEST | Name the YMCA as a beneficiary of a specific amount or percentage of your estate through a | Make a provision for the future of the YMCA. You retain full control of the funds during your | Upon your passing, the YMCA will use the funds in accordance with your designation. |
| RETIREMENT ASSETS | Name the YMCA as a beneficiary of all or some percentage of your retirement account using the form provided by your plan administrator. | Make a provision for the future of the YMCA. You retain full control of the funds during your lifetime. You can make a gift from the most highly | Upon your passing, the YMCA will use the funds in accordance with your designation. |
| LIFE INSURANCE | Create a new life insurance policy based on a maximum five-year premium payout schedule in which the YMCA is the owner and beneficiary of | Leverage your philanthropic dollars for a much larger impact on the YMCA. If you fund a new policy, your premium payment that comes to the | Upon your passing, the YMCA will use the funds in accordance with your designation. Cashed out policies can provide immediate impact. |
| CHARITABLE GIFT ANNUITY | Establish a charitable gift annuity contract with the YMCA that guarantees one or two individuals a fixed amount of income for their lifetime. | Make a provision for the future of the YMCA. You will receive a guaranteed, fixed income for your lifetime. For those who itemize, you will receive | Upon your passing, the YMCA will use the funds in accordance with your designation. |
| CHARITABLE REMAINDER TRUST | Create a trust that pays a fixed percentage of the trust's assets or pay a fixed payment annually to one or more individuals. This is a way to benefit | Make a provision for the future of the YMCA. You will receive fixed or variable income for life or a term up to 20 years. For tax purposes, you can | Upon your passing, the YMCA will use the funds in accordance with your designation. |
| CHARITABLE LEAD TRUST | Create a trust that pays either a fixed or variable income to the YMCA for a specific term of years, after which time the remainder is passed along to | See the immediate impact of your gift at the YMCA. You will significantly reduce your taxable estate and pass along assets to your children or | The YMCA is able to use your gift immediately to meet current needs in the area you designate. |
| REAL ESTATE | Donate property outright, reserve a life estate where you continue to live on the property or donate property in exchange for life-income. | provision for a future impact to the YMCA. You will be able to take an income tax deduction and reduce or eliminate capital gains taxes. | The YMCA is able to use your gift immediately or upon your passing to meet needs in the area you designate. |