## Giving Instruments

<table>
<thead>
<tr>
<th>YOUR GIFT</th>
<th>YOUR GOAL</th>
<th>HOW TO MAKE THE GIFT</th>
<th>BENEFITS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NOW</strong></td>
<td><strong>LATER</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Outright gift of cash                  | Make a gift from liquid assets                | Make a gift via check or credit card to Asolo Theatre, Inc. Gifts may be made in full or in installments of up to five years | • Immediate income tax deduction  
• Possible estate tax savings     |
| Outright gift of securities            | Avoid capital gains tax                       | Contribute long term appreciated stock or other securities to Asolo Theatre, Inc. | • Immediate income tax deduction  
• Avoidance of capital gains tax  |
| Grant from Donor Advised Fund or Foundation | Make a gift from your charitable giving fund | Contact your community foundation or financial institution to make a grant to Asolo Theatre, Inc. | • Provide ongoing support to Asolo Rep from funds designated for charitable purposes |
| Bequest from Will or from Revocable Trust | Make a revocable gift during your lifetime    | Name Asolo Theatre, Inc. as a beneficiary                     | • Donation is exempt from federal estate tax                            |
| Gift of Individual Retirement Account  | Avoid the twofold taxation on IRAs or other employee benefit plans | Name Asolo Theatre, Inc. as the beneficiary of the remainder of the IRA at your death OR direct lifetime gifts directly from the IRA to Asolo Theatre, Inc. (you must be over 70.5 years old and this option is limited to $100,000 per year) | • Allows you to pass other assets to your heirs, minimizing their future income tax liability |
| Gift of Life Insurance                 | Make a large gift with little cost to yourself | Give a life insurance policy you no longer need and/or name Asolo Theatre, Inc. as the beneficiary | • Current income tax deduction  
• Possible future deductions through gifts to pay policy premiums |
| Charitable Gift Annuity               | Supplement income with a guaranteed fixed amount that is partially tax free | Enter into a charitable gift annuity contract with a community foundation for the benefit of Asolo Theatre, Inc. | • Current and future savings on income taxes  
• Stable income for you for life |
| Charitable Remainder Annuity Trust     | Secure a fixed and often increased income     | Create a charitable remainder trust that pays you a set amount annually; the remainder passes to Asolo Theatre, Inc. | • Immediate income tax deduction  
• Fixed income for life, often at a higher rate of return |
| Charitable Lead Trust                  | Reduce gift and estate taxes on assets you pass to children or grandchildren | Create a charitable trust that pays fixed or variable income for Asolo Theatre, Inc. to use for a specific term of years; principal is retained for heirs | • Reduces your taxable estate  
• Your family keeps the property, often with reduced estate taxes |
| Gift of Real Estate                    | Avoid capital gains tax on the sale of a home or other real estate | Donate the property or sell it at a bargain rate to Asolo Theatre, Inc. | • Immediate income tax deduction  
• Reduction or elimination of capital gains tax |
| Retained Life Estate                   | Give your personal residence now but continue to live there | Designate ownership of your home to Asolo Theatre, Inc., but retain occupancy | • Valuable charitable income tax deduction  
• Lifetime use of residence |