

Giving Instruments

	YOUR GIFT	YOUR GOAL	HOW TO MAKE THE GIFT	BENEFITS
NOW	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	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • Provide ongoing support to Asolo Rep from funds designated for charitable purposes
LATER	Bequest from Will or from Revocable Trust	Make a revocable gift during your lifetime	Name Asolo Theatre, Inc. as a beneficiary	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Valuable charitable income tax deduction • Lifetime use of residence