



Charitable Choices and Planned Giving Options

Your Charitable Choices

There are many types of assets donors can give to begin their charitable fund or support an existing fund. Each philanthropic opportunity offers different financial and tax benefits. Your financial advisor and a member of our team can assist with identifying the right charitable choice for you.

Cash A check or credit card is the simplest type of charitable gift.

Make checks payable to:

The Legion Fund at CFSKY and mail to: PO Box 737; Bowling Green, KY 42102

Online credit gifts can be made at: **TheLegionFund.org**

Stocks, Bonds, Mutual Funds Allows you to avoid the capital gains tax on the appreciated portion of the gift. Please contact **Jennifer Wethington at CFSKY (270)-904-2079** when making a stock transfer to ensure the transfer is applied to **The Legion Fund**.

Life Insurance Transfer ownership to the Community Foundation and receive a tax deduction for the policy's cash value.

Real Estate Gift property you own and receive the maximum tax deduction allowed by law as well as avoid capital gains tax on the sale.

Give Later

The Foundation can help you establish in partnership with your estate planning attorney, CPA or financial adviser.

Charitable Bequest Continue your impact on the community after your lifetime with a gift left in your estate.

Charitable Trusts A charitable lead trust or charitable remainder trust provides tax savings while allowing a significant gift or income for a charity.

Life Insurance Transfer ownership to the Community Foundation and receive a tax deduction for the policy's cash value.

Retirement Account Assets & IRAs Naming the Foundation as the beneficiary of a retirement account allows you to save taxes and preserve your hard-earned assets for the good of your community.

Common Events That Provide Opportunities For Giving:

- Selling a business, house, or other major assets
- Starting a nonprofit or private foundation
- Teaching family members about philanthropy
- Honoring a loved one after their passing
- Estate planning, especially for individuals without heirs
- Leveraging equity in a closely held family business
- Preparing for retirement