



PLANNED GIVING | AN EASY REFERENCE GUIDE

Making a planned gift to is easier than you might expect: you can create a lasting legacy without a change in your income or lifestyle. In fact, you can realize tax benefits and in some cases income that you may not otherwise have received. Our team is ready to talk to you at any time and create a personalized gift plan based on your goals, priorities, and capabilities. **Your gift will support ONE VISION: The Campaign for Doylestown Health and the future of healthcare excellence in our community.**

YOUR GIFT

HOW TO MAKE YOUR GIFT

HOW YOUR GIFT BENEFITS YOU

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| Bequest | Name Doylestown Health in your will. | Your donation is exempt from federal estate tax. |
| Revocable living trust | Name Doylestown Health as the beneficiary of assets in a living trust. | You maintain control of the trust for your lifetime. |
| Outright gift of cash | Write a check or make a cash donation to Doylestown Health. | You receive an immediate income tax deduction and may realize estate tax savings. |
| Outright gift of securities | Contribute long-term appreciated stock or other securities to Doylestown Health. | You realize an immediate charitable deduction and avoid capital gains tax. |
| Gift of life insurance | Contribute a life insurance policy you no longer need and/or name Doylestown Health as the beneficiary. | You receive a tax deduction on your income and possible future deductions through gifts to pay policy premiums. |
| Gift of retirement assets | Name Doylestown Health as the beneficiary of the remainder of your assets after your lifetime. | Your heirs realize a cost savings on your assets. |
| Gift of real estate | Donate a property to Doylestown Health or sell it to us at a bargain price. | You realize an immediate income tax reduction and a reduction or elimination of capital gains tax. |
| Retained life estate | Designate ownership of your home to Doylestown Health, but retain occupancy. | You receive a valuable charitable income tax deduction and retain the use of your residence for your lifetime. |
| Charitable remainder trust | Create a trust that pays a fixed percentage of its assets to Doylestown Health as revalued annually. | You receive a variable income for life and an immediate income tax charitable deduction. |
| Charitable remainder annuity trust | Create a charitable trust or a charitable gift annuity* that pays you a set income annually. | You receive an immediate income tax deduction and a fixed income for life, often at a higher rate of return. |
| Charitable gift annuity | Enter a charitable gift annuity* contract with Doylestown Health that pays a guaranteed income annually. | You realize current and future savings on income taxes, and a stable income for life. |
| Charitable lead trust | Create a charitable trust that pays fixed or variable income for a specified term of years; the principal is retained for your heirs. | Your taxable estate is reduced and your heirs keep the property, often with reduced gift taxes. |