PLANNED GIVING OPTIONS
QUEBEC-LABRADOR FOUNDATION
MAY 2018

BEQUEST
Donor Benefits
- Simple and flexible – make changes any time
- Retain use of your assets
- Designate a percentage of your estate, a specific amount, or a particular asset

Advantages
- Federal estate tax deduction for amount of bequest

DESIGNATION OF RETIREMENT PLANS
Donor Benefits
- Easy to implement – usually requires a simple form

Advantages
- Federal estate tax deduction for amount of gift
- No income tax liability for other beneficiaries of your estate
- Funds disbursed directly from custodian to QLF

CHARITABLE GIFT ANNUITY
Donor Benefits
- Secure, stable, guaranteed payments
- Uncomplicated, easy to understand
- Fund with cash or marketable securities

Advantages
- Charitable income tax deduction in year of gift
- No income tax liability until payments begin
- Favorable capital gains treatment for gifts of appreciated securities

CHARITABLE REMAINDER UNITRUST
Donor Benefits
- Variable income for life or a term of years
- Income determined by percentage of market value each year
- Flexibility to meet income needs
- Fund with cash, marketable securities, closely-held securities or real estate

Advantages
- Charitable income tax deduction in year of gift
- No capital gains tax on transfer of assets
- Potential estate tax savings

CHARITABLE REMAINDER ANNUITY TRUST
Donor Benefits
- Fixed income for life or a term of years
- Fund with cash or marketable securities

Advantages
- Charitable income tax deduction in year of gift
- No capital gains tax on transfer of assets
- Potential estate tax savings

We hope that you will consider a planned gift to the Quebec-Labrador Foundation. Your attorney and financial advisor will advise on the best option for you. For more information on how to accomplish your goals and leave a lasting gift to QLF, please contact Elizabeth Alling, President at Ealling@QLF.org ~ 978.886.0408 (Mobile)

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