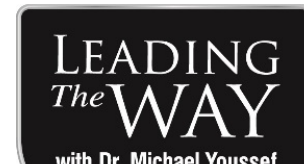


# Taxes Are Optional

Charitable Strategies for Reducing Tax Liability

Thank you for joining!  
Our webinar will begin  
promptly at 7pm EST

Contact us: [giving@ltw.org](mailto:giving@ltw.org)

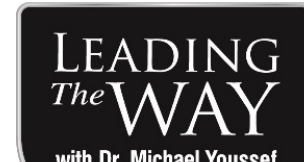


# Taxes Are Optional

Charitable  
Strategies for  
Reducing Tax  
Liability



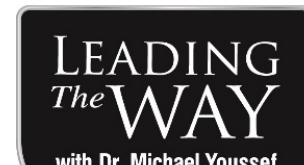
Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# PLANNED GIVING: The Market Reality

- Largest Wealth Transfer in History –  
\$41 Trillion
- 9% cash vs. 91% assets
- 70% of Americans do not have a current will  
or trust

Contact us: [giving@ltw.org](mailto:giving@ltw.org)

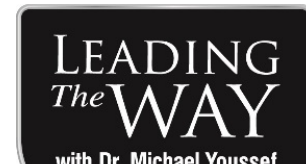


# 3 Ultimate Estate Destinations

- Loved ones
- Charity
- I.R.S.

Most people can choose any 2 of these 3...but if you do nothing your estate will go to your loved ones and the I.R.S.

Contact us: [giving@ltw.org](mailto:giving@ltw.org)

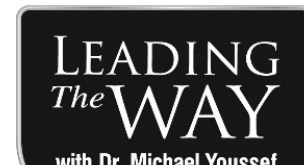


# Ways to Make a Planned Gift

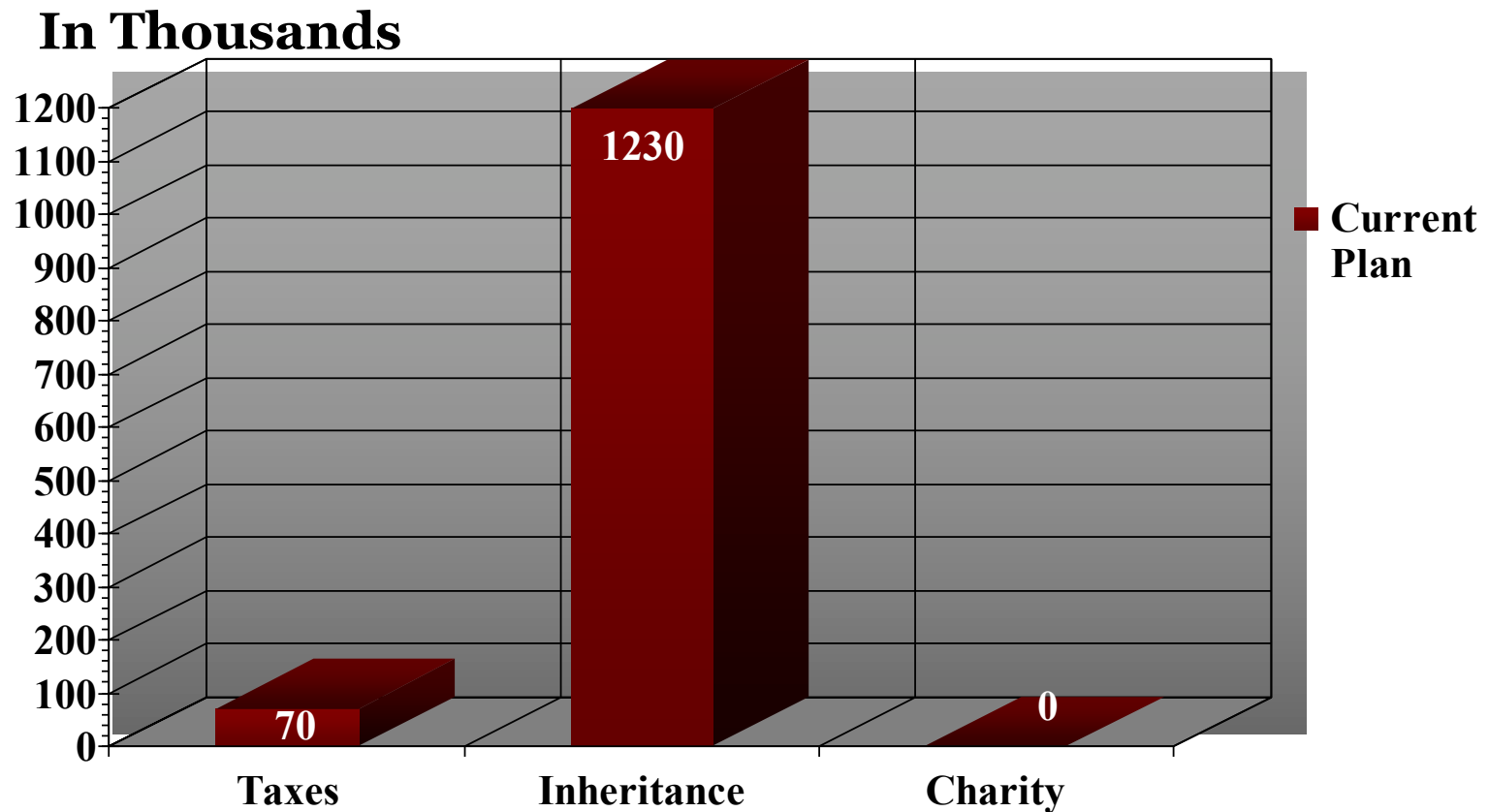
- In Your Will – Leaving a Legacy
- Asset Gift – Reducing Capital Gains
- Gift Annuity
- IRA Rollover

Each of these can save taxes and increase your charitable capacity.

Contact us: [giving@ltw.org](mailto:giving@ltw.org)



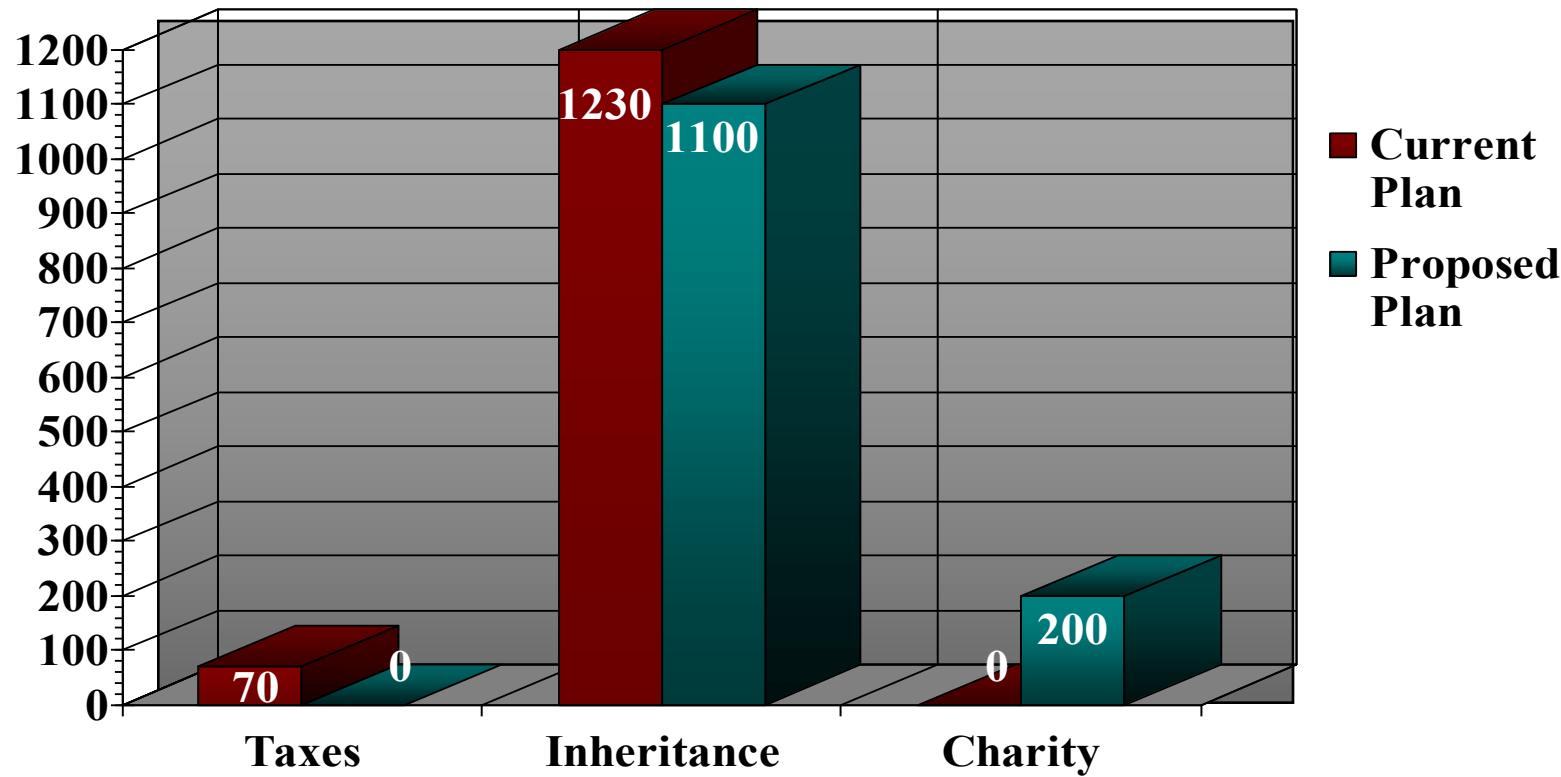
# The Adams (In Your Will)



Contact us: [giving@ltw.org](mailto:giving@ltw.org)

# The Adams

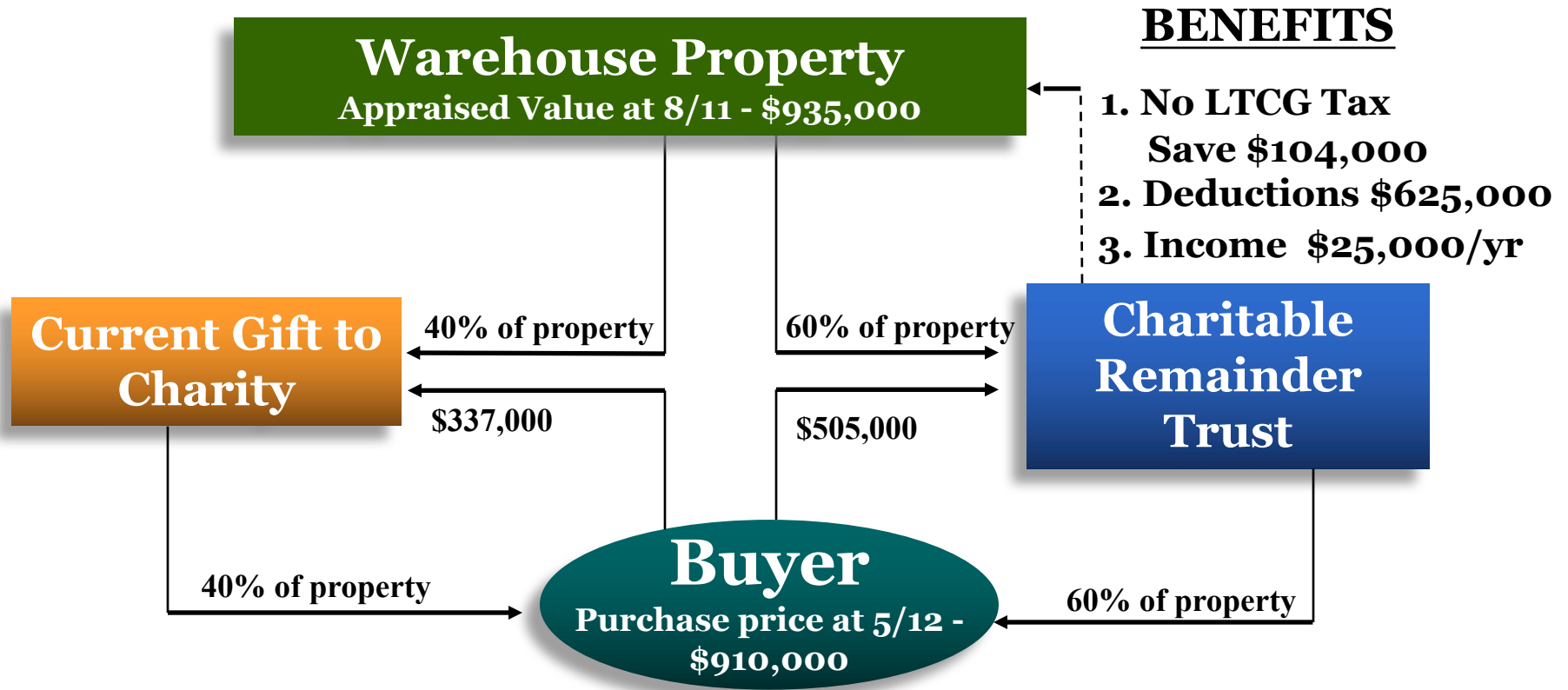
In Thousands



Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# John and Barbara Kirkpatrick (Asset Gift)



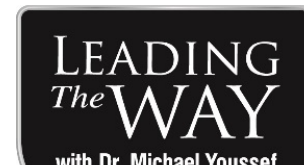
Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# Gifts of Assets

- Stocks
- Rental property/Appreciated assets
- Second home
- Business sales

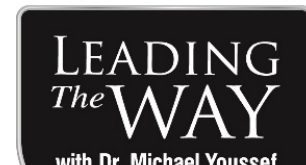
Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# Gift Annuity

- Provides higher interest rates on savings based on your age
- Provides a lifetime of income
- Provides a tax deduction
- Provides a current gift to Charity

Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# Gift Annuity - Sample

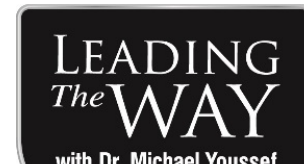
*Gift Annuity NOW – Benefits Summary*  
*Bill and Mary Jones – Age 79 & 77*  
*\$25,000 Design – 2 Life Option*



*An initial repositioning of \$25,000 results in:*

- 1. \$9,483 immediate cash gift*
- 2. \$9,483 immediate tax deduction to donor*
- 3. Tax favorable and guaranteed income stream for life (\$1,350 per year)*

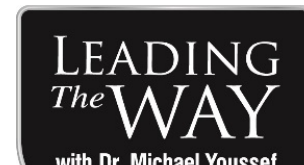
Contact us: [giving@ltw.org](mailto:giving@ltw.org)



# IRA Rollover

- Designed for people over 70 years old
- Allows a gift directly from IRA to charity – “pre tax gift”
- Meets your Required Minimum Distribution
- Up to \$100,000 per year

Contact us: [giving@ltw.org](mailto:giving@ltw.org)



You can get started by visiting the  
My Legacy Planner at:

[www.LTW.org/MyLegacyPlanner](http://www.LTW.org/MyLegacyPlanner)

or by contacting me at  
[RBlackmon@GivingCrowd.co](mailto:RBlackmon@GivingCrowd.co)

Contact us: [giving@ltw.org](mailto:giving@ltw.org)

