

# Ways to Support the Campaign

## *RESTRICTED AND UNRESTRICTED GIFTS*

Gifts of any size may be designated for a specific campaign goal chosen by the donor. Or a gift may be made without restrictions. Unrestricted gifts provide flexibility to allocate the funds where they are most needed at the time.

## *NAMED GIFTS*

Make a gift in honor or memory of someone who is connected to the area. Or you can associate your name with a major project or a Legacy Fund opportunity. ESHP will be pleased to provide a list of such opportunities or discuss other naming possibilities.

## *GIFTS OF CASH*

Many gifts to the campaign will be cash contributions, for which donors may receive tax benefits if they itemize deductions. Pledges to the campaign may be paid over a period of up to five years.

## *PLANNED GIFTS AND BEQUESTS*

Many donors discover that they can make a substantial gift through planned giving. Donors may enjoy full tax benefits for such contributions, enhancing their own financial situation even as they make a lasting contribution to the Bank of Everglades transformation. Life income gifts such as trusts will be counted at their discounted present value. Gifts of life insurance policies for which ESHP is the owner and beneficiary will be counted at cash value. Bequest intentions will be recognized but not counted.

## *SECURITIES*

Many donors may realize substantial tax advantages by transferring gifts of appreciated stock. Capital gains on the amount of appreciation are avoided, and the donor receives a tax deduction for the stock's full market value.

## *RESIDENCES AND REAL ESTATE*

Gifts of residences and real estate can be advantageous ways of making sizable gifts to ESHP.

Residences can be given, allowing the donor to realize a tax deduction, avoid the capital gains tax and retain lifetime occupancy, if desired.

## *OTHER PROPERTY*

Gifts of tangible property may result in an immediate tax deduction for the donor, with the amount of the deduction determined by whether or not the gift is related to the mission of ESHP. The gift may also lessen or eliminate the donor's estate taxes. All gifts-in-kind will be credited to the campaign at the appraised value, including donations of art, equipment, rare books, real estate and similar non-monetary contributions.

## *MATCHING GIFTS*

Thousands of companies match donations that employees make to institutions like ESHP. Donors are urged to request that their employers match their gifts.

## *CHARITABLE GIFT ANNUITIES*

A charitable gift annuity is a contract between a donor and a qualified charity in which the donor makes a gift to the charity. In exchange, the charity assumes a legal obligation to provide you and up to 1 additional beneficiary with a fixed amount of monthly income that continues until the last beneficiary dies. Part of your gift will be used by the charity immediately for its charitable purposes, and part of the gift is set aside in a reserve account to be invested to support your future income payment.