

Charitable Checklist

Giving to your favorite charities can be as simple as writing a check, but the Community Foundation can help you find even more ways to give back. Enjoy tax and income benefits while creating a family legacy of giving in our community.



Create a Donor-Advised Fund. Get a tax deduction now and recommend distributions to charities later (especially when you have a highly taxable event.) A donor-advised fund is a great way to simplify your charitable giving.

Give Forever to What You Care About Most. Have you given to a particular organization or cause for a long time? You can create an endowment at CFWC to benefit them or a cause close to your heart. This ensures the organization continues receiving your annual gift in perpetuity.

Give Appreciated Stock. If you have held stock for more than one year that has increased in value, you can donate it to CFWC and receive a charitable income tax deduction for the full fair market value on the date of your gift, and not have to pay capital gains tax!

Give your IRA – Tax Free. An IRA is the most expensive asset in one's estate, taxed both as a part of the estate and as ordinary income when withdrawals are made by heirs. You can enjoy your IRA's income during your lifetime and name CFWC as the ultimate beneficiary, while choosing other, less tax-prone assets to leave to your heirs.

Make a Gift that Pays Income for Life. Are you charitably inclined, but also interested in finding ways to supplement your annual income? You can make a gift to CFWC now, receive a tax deduction, and in exchange, collect a guaranteed lifetime income from us. Ask us about the different options that pay you income for life.

Give Life Insurance. Do you own life insurance policies you no longer need? You can transfer ownership of a policy to CFWC to use for the charitable purpose of your choice. Or, you can open a new policy owned by CFWC, and make a tax-deductible annual gift to cover the cost of the premium. Either option can result in a significant gift to charity.

Leave a Gift in your Will. The simplest way to make a significant gift while reserving your assets for your own needs during your lifetime is to name CFWC in your will or as a beneficiary of a financial account. The CFWC will then carry out your charitable wishes now and into the future.

Questions?

Contact Executive Director Brad Sell or Director of Development Cheryl Brown at (301) 745-5210. E-mails: brads@cfwcmd.org or cherylb@cfwcmd.org.

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