

Ways to Plan a Gift

	Qualified Retirement Assets	Endowment Fund	Bequest	Beneficiary Designation	Life Insurance	Charitable Lead Trust	Charitable Remainder Trust
Description	A generous gift whose value to WPH may be significantly greater than to family due to tax treatment.	A gift that is invested in order to distribute income to mission now and for generations to come.	A gift through your will or trust enables you to provide significant support for our mission.	One of the simplest gifts through a simple transfer of a financial account after your lifetime.	A generous gift to WPH of a policy.	A generous gift of income payments for a set period of years (often 20 years) after which the assets are transferred back to the grantor or heirs.	An irrevocable gift to a trust that provides you a fixed or variable income for life or a set term. At termination, the residual goes to WPH.
Next Steps	Name WPH your beneficiary on a simple form from your plan administrator.	Set up an endowment fund and name a charitable beneficiary.	Name the WPH in your will or living trust. You can choose a percentage of specific value.	Change the beneficiary named at your bank or financial institution.	Change ownership or name WPH as beneficiary of a paid up policy.	To establish a lead trust, be certain to work with a reliable, experienced estate attorney.	Establish a charitable remainder trust and name a trustee. Then transfer assets.
Minimum \$ To Establish	No Minimum	\$25,000	No Minimum	No Minimum	No Minimum	\$250,000	\$100,000
Benefits	<ul style="list-style-type: none"> (1) Your Generous Support. (2) No estate or income taxes for the WPH. (3) Heirs receive less tax-burdened assets. 	<ul style="list-style-type: none"> (1) Your Generous Support. (2) Potential income tax deduction for current gift. (3) Fully deductible for estate taxes if testamentary. 	<ul style="list-style-type: none"> (1) Your Generous Support. (2) Retain the asset for your use during your lifetime. (3) Fully deductible for federal estate taxes. 	<ul style="list-style-type: none"> (1) Your Generous Support. (2) Quick and Simple. 	<ul style="list-style-type: none"> (1) Your Generous Support. (2) Potential income tax deduction. 	<ul style="list-style-type: none"> (1) Income to WPH. (2) Removes trust assets from estate (3) After the trust, assets go to heirs with little or no tax. (4) No immediate deduction. 	<ul style="list-style-type: none"> (1) Your Generous Support. (2) Fixed or variable income. (3) Income tax deduction. (4) Reduce estate (tax) size. (5) Can change beneficiary.

* Please consult your qualified professional advisors on how any of these gifts might fit into your overall plans and your eligibility for tax benefits.