

# FIND A PLAN THAT'S RIGHT FOR YOU

First of all, thank you for considering a gift to help support Guide Dogs of the Desert. We know you support our work because you believe in what we do, and because you want to help make a difference in the lives of others. But we'd also like to make sure you benefit from making a gift to us.

## You Have Options

You are probably familiar with outright gifts, such as cash or a check, which you make today and we can use right away. But sometimes an immediate gift isn't the best option, especially if you feel unsure about giving up assets today that you and your loved ones might need in the future.

A planned gift is a perfect solution to this problem. There are many different types of planned gifts and each offers unique advantages. Some planned gifts are revocable so you can change your mind at any time.

Or, they can be irrevocable—just as outright gifts are—so that you benefit from an immediate income tax deduction.

Irrevocable planned gifts are attractive because they are deferred. You part with an asset today, but the actual giving of the asset to us is put off for a while—often until after your lifetime (and that of a surviving beneficiary, if you wish). Until that time, you enjoy the benefits from the gift.

The key feature of planned gifts like these is that they provide important benefits to you *as well as* Guide Dogs of the Desert.

## LEARN MORE

We've designed the chart inside to summarize the benefits of several common charitable gifts. Just think of what you want to accomplish with your gift, and there's probably a way to do it!

We're here to answer any questions you might have about planned giving. We can examine your particular situation and, together with your attorney and/or financial advisors, help you find ways to support our mission while ensuring your family's financial security.



## Get Started Today

- 1 VISIT [guidedogsofthedesert.planmylegacy.org](http://guidedogsofthedesert.planmylegacy.org)** to learn more about the gift options described in this guide.
- 2 CONSULT** with your financial and legal advisors to find the gift that meets your personal and philanthropic goals.
- 3 CONTACT** us with any questions or to let us know that you've included a gift to Guide Dogs of the Desert in your plans.



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# Planning Strategies



# PLAN AHEAD

	Your Gift	Your Goal	How You Make the Gift	Your Benefits
<b>Simple Gifts Anyone Can Make</b>	Your Will or Trust A Beneficiary Designation	<ul style="list-style-type: none"> <li>Defer a gift until after your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>Work with your attorney to add a few simple sentences to your will or living trust detailing your donation to Guide Dogs of the Desert.</li> <li>Designate Guide Dogs of the Desert as beneficiary of a percentage of your retirement plan, health savings plan or life insurance policy.</li> </ul>	<ul style="list-style-type: none"> <li>Maintain your current lifestyle while making a meaningful gift to support Guide Dogs of the Desert.</li> <li>Enjoy flexibility to change your plans as life changes.</li> <li>Pass your retirement plan assets to Guide Dogs of the Desert tax-free.</li> </ul>
<b>Gifts of Assets</b>	Stock or Other Securities Real Estate Personal Property	<ul style="list-style-type: none"> <li>Make a gift now or in the future that provides tax benefits.</li> <li>Make a larger gift with little or no effect on cash flow.</li> </ul>	<ul style="list-style-type: none"> <li>Give stock or securities that have increased in value directly to Guide Dogs of the Desert.</li> <li>Donate real estate.</li> <li>Donate tangible personal property such as art, collectibles or other items of value.</li> </ul>	<ul style="list-style-type: none"> <li>Receive immediate income tax benefits.</li> <li>Avoid capital gains taxes on assets that have increased in value.</li> <li>Transfer the expense of insuring or maintaining assets you no longer need.</li> </ul>
<b>Gifts That Pay You Income</b>	Charitable Gift Annuity*	<ul style="list-style-type: none"> <li>Supplement your retirement income with steady payments.</li> <li>Receive payments that are partially income tax-free.</li> </ul>	<ul style="list-style-type: none"> <li>Make a donation of cash or securities to benefit Guide Dogs of the Desert through a simple exchange for fixed payments for life.</li> </ul>	<ul style="list-style-type: none"> <li>Receive current <i>and</i> future savings on income taxes.</li> <li>Enjoy tax savings on a portion of each payment you receive.</li> </ul>
<b>A Flexible Gift That Pays Income</b>	Charitable Remainder Unitrust Charitable Remainder Annuity Trust Charitable Lead Unitrust Charitable Lead Annuity Trust	<ul style="list-style-type: none"> <li>Supplement your own retirement income or that of someone else with a charitable remainder trust.</li> <li>Provide a revenue stream to Guide Dogs of the Desert with a charitable lead trust.</li> </ul>	<ul style="list-style-type: none"> <li>You transfer cash, securities or other appreciated property into a charitable remainder trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to you, or another beneficiary if you choose, for a lifetime or a term up to 20 years. When the term is up, the balance goes to Guide Dogs of the Desert.</li> <li>You transfer securities or other appreciating property into a charitable lead trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to Guide Dogs of the Desert for a lifetime or term of years. The balance then passes to your heirs.</li> </ul>	<ul style="list-style-type: none"> <li>With a charitable remainder trust, you can make a generous gift to Guide Dogs of the Desert, receive an immediate income tax deduction for the charitable portion of your gift and eliminate capital gains tax when the trust is funded with appreciated assets.</li> <li>Support Guide Dogs of the Desert during your lifetime, reduce your taxable estate and often reduce gift taxes with the charitable lead trust.</li> </ul>

## Join Other Supporters to Increase Your IMPACT

Over the years, supporters like you have selflessly given their time, talent and assets to help provide custom-trained guide dogs for the blind. Each contribution has allowed us to sustain a growing level of support that secures our long-term financial stability.



If you feel strongly about our charitable work and would like to join together with other supporters who share your values, we hope you'll consider joining The Maynard Society.

If you have already included Guide Dogs of the Desert in your estate, please let us know so we can properly thank you and welcome you into The Maynard Society.