WOFFORD

GIFT PLANNING COMPARISON CHART

	Bequest	Charitable Gift Annuity	Charitable Remainder Unitrust	Charitable Remainder Annuity Trust	Charitable Lead Trust	Life Insurance	Retained Life Estate	Retirement Plan Assets
I WANT INCOME (FOR MYSELF OR OTHERS)...								
fixed payments		✓		✓				
payments that vary based on value			✓					
I WANT THE PAYMENTS TO CONTINUE...								
for life		✓	✓	✓				
for a term of years			✓	✓				
I WOULD LIKE TO USE THE FOLLOWING ASSETS FOR MY GIFT:								
cash	✓	✓	✓	✓	✓			
appreciated securities	✓	✓	✓	✓	✓			
personal residence, farm or vacation property	✓		✓				✓	
investment real estate	✓		✓					
family or closely held business			✓		✓			
retirement plans								✓
insurance policy						✓		
personal or real property (art, car, home, etc.)	✓							
I AM INTERESTED IN THE FOLLOWING TAX BENEFITS:								
charitable gift income tax deduction		✓	✓	✓	✓	✓	✓	✓
reduced capital gains taxes		✓	✓	✓	✓		✓	
reduced estate taxes	✓	✓	✓	✓	✓			✓
income that may be partially tax free		✓						
reduced income tax liability for my heirs								✓