



Ways to Leave a Planned Gift

A planned gift is a powerful way to make a lasting impact on the lives of children and families while meeting your financial, tax, and estate planning goals. Whether through a bequest, a gift of real estate, or other creative options, your generosity helps ensure that Tanager's mission continues for generations.

All planned gifts are invested in the Tanager Endowment, providing sustainable support in perpetuity.

- Create a lasting legacy that aligns with your values.
- May provide tax advantages and income benefits.
- Flexible options tailored to your goals and assets.
- Gifts can be made during your lifetime or through your estate.
- Your gift is invested in the Tanager Endowment for lasting impact.

Bequest in a Will or Trust

Leave a specific dollar amount, a percentage of your estate, or a residual portion after other bequests are fulfilled.

Benefits: Simple to arrange, revocable, and often reduces estate taxes.

Beneficiary Designation

Name Tanager as a beneficiary of your retirement plan, life insurance policy, or bank/brokerage account.

Benefits: Easy to establish, avoids probate, and may reduce income and estate taxes.



Ways to Leave a Planned Gift, cont'd

Gifts of Appreciated Assets

Donate stocks, bonds, or other appreciated securities to avoid capital gains tax and receive a charitable income tax deduction.

Benefits: Maximize impact while minimizing taxes.

Charitable Gift Annuity

Make a gift to Tanager and receive fixed income payments for life. The remaining balance supports Tanager's programs.

Benefits: Maximize impact while minimizing taxes.

Charitable Remainder Trust

Transfer assets into a trust that provides you or your beneficiaries with income for life or a set term, with the remainder benefiting Tanager.

Benefits: Potential tax savings and flexibility in managing assets.

Charitable Lead Trust

Provide annual income to Tanager for a specific term, after which remaining assets return to your heirs.

Benefits: Reduces estate taxes and allows you to transfer wealth efficiently.



Ways to Leave a Planned Gift, cont'd

Gifts of Real Estate

Transfer assets into a trust that provides you or your beneficiaries with income for life or a set term, with the remainder benefiting Tanager.

Benefits: Potential tax savings and flexibility in managing assets.

Life Insurance Gifts

Provide annual income to Tanager for a specific term, after which remaining assets return to your heirs.

Benefits: Reduces estate taxes and allows you to transfer wealth efficiently.

How to Begin

1. Discuss your goals with your financial or estate planning advisor.
2. Contact the Tanager Philanthropy Office for guidance and sample language.
3. Notify us of your plans so we can honor your legacy.

Tanager
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This information is not intended as legal or tax advice. Please consult your professional advisors before making a gift.

Please visit www.tanagerplace.org/donate for more information on all ways to give, or contact the Tanager Philanthropy team at:
(319) 365-9164 or philanthropy@tanagerplace.org.