

# PLANNED GIVING OPTIONS

*There are a number of ways you can make a gift. Each one provides distinct advantages for you and your loved ones. This chart briefly outlines some of the options available.*



PLANNED GIFT	WHAT IS IT?	HOW DOES IT WORK?	WHAT ARE THE BENEFITS?	TYPICAL GIFTS
Charitable Bequest in your will or trust	Providing for Maranatha in your will or trust while maintaining control and use of assets during your lifetime.	Designate any asset or money in will or living trust to Maranatha as beneficiary.	<ul style="list-style-type: none"> <li>• Continue ownership and control over property.</li> <li>• Can revise bequest any time during your lifetime.</li> <li>• Receive estate tax deduction.</li> </ul>	Cash, investments, real estate, life insurance, retirement accounts
Retained Life Estate	Deed your residence to Maranatha while retaining the right to use it during your lifetime.	Irrevocably deed home to Maranatha with a life lease clause.	<ul style="list-style-type: none"> <li>• Current income tax deduction.</li> <li>• Retain right to use home for rest of your life, a term of years, or a combination.</li> <li>• Possible reduced probate costs and estate taxes.</li> </ul>	Primary home, second or vacation home, farm
Charitable Remainder Trust	Place asset into a trust that provides an annual income to you during your lifetime. Maranatha receives remaining trust principal at death.	Contribute assets into charitable remainder trust. Assets will be sold tax-free.	<ul style="list-style-type: none"> <li>• Receive annual income for life.</li> <li>• Tax savings from charitable deduction.</li> <li>• No capital gains tax from sale of appreciated property.</li> </ul>	Cash, investments, or real estate
Charitable Lead Trust	Place asset into a trust that provides annual income to Maranatha for specified time period, then heirs receive trust principal.	Transfer assets into charitable lead trust. Distributions will be made to Maranatha for a stated period and then assets are distributed to heirs.	<ul style="list-style-type: none"> <li>• Current income tax deduction.</li> <li>• Receive charitable gift or estate tax reduction</li> <li>• Eliminate gift or estate taxes for heirs.</li> </ul>	Real estate or other growth property, works best with large estates
Gift Annuity	An annuity agreement between Maranatha and donor.	A donation is given to Maranatha in exchange for fixed payments for life.	<ul style="list-style-type: none"> <li>• Current tax deduction.</li> <li>• Receive fixed payments for life that may be partially tax-free.</li> </ul>	Generally cash or other investments