

BLENDING GIFTS:

THE BEST OF



Kristine Lutton, CPGA

Donor Advisor

Email: Kristine.Lutton@abc-usa.org



BOTH WORLDS

What Are Blended Gifts?

Blended gifts use different types of charitable gifting strategies such as outright gifts, planned gifts and estate gifts to accomplish your giving desires. Which combination of these strategies to use depends upon your unique personal situation. Taking into consideration your current and future financial, tax and charitable planning goals, blended gifts can be formulated to help you determine best how to give, what to give and when to give.

Example of a Blended Gift

Joan is a generous annual donor who owns an IRA from which she must annually take a required minimum distribution (RMD). By making a direct qualified charitable distribution (QCD) to charity, she will not have to recognize this distribution as taxable income, and it will qualify toward her annual RMD. Since the IRA is highly taxable when left to heirs, she also decides to name charities as the beneficiary of the IRA's remaining balance at her passing.

Outright/ Current Gifts	Planned Gifts	Estate Gifts
Cash	Charitable Gift Annuity	Bequest
Appreciated Assets	Charitable Remainder Trust	Beneficiary Designation
Donor Advised Fund	Charitable Pooled Fund	Payable on Death/ Transfer on Death
IRA QCD	Charitable Lead Trust	



**Maximize the Impact
of Your Giving Today
and in the Future**

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

23PY23

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Copyright © 2023 Crescendo Interactive, Inc. Used by permission.