

# QUICK PLANNER



	Bequest	Retirement Plan/ IRA Beneficiary Designation	Charitable Gift Annuity	Charitable Remainder Trust	IRA Qualified Charitable Distribution (Must be at least 70 ½ years old)
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## I would like to make a gift...

During my life			✓	✓	✓
Upon my death	✓	✓		✓	

## I have the following assets available to make a gift...

Cash	✓		✓	✓	
Stock/bond/mutual funds	✓		✓	✓	
Real estate	✓			✓	
Retirement plan/IRA		✓	✓		✓
Life insurance policy		✓			

## Benefits that are important to me are...

Income			✓	✓	
Income tax deduction			✓	✓	
Estate tax savings	✓	✓	✓	✓	
Capital gain tax savings			✓	✓	
Lifetime control of assets	✓	✓		✓	

## If my gift provides income, I prefer that it is...

Fixed			✓	✓	
Variable				✓	

Please contact the Development Department, at (845-566-7300) or [GHV.Development@scouting.org](mailto:GHV.Development@scouting.org) if you have questions or would like more information, or visit [ghvbsa.org/ways-to-support-scouting](http://ghvbsa.org/ways-to-support-scouting).

