



JUNIOR ACHIEVEMENT PLANNED GIVING

GROWING A LEGACY

GOALS & BENEFITS OF PLANNED GIFTS

If your goal is to:	Then you can:	And your benefits are:
Make a quick and easy gift	Simply write a check now	An income tax deduction and immediate impact for JA
Secure a fixed life income while avoiding marketing risks	Establish a charitable gift annuity	Tax benefits and often a boosted rate of return from assets
Defer a gift until after your lifetime	Put a bequest in your will (cash, specific property, or a share of the residue)	Estate tax deduction and keep assets in your name during your lifetime
Maximize heir's inheritance while benefiting JA	Name JA as beneficiary or your retirement plan, leave other assets to family	Reduced estate and income tax
Avoid tax on capital gains	Give appreciated stock or bonds held over 1 year	An income tax deduction and avoidance of capital gains tax
Share your enjoyment of a collection or other personal item	Donate tangible personal property related to JA's mission	A charitable deduction based on the full fair market value
Make a large gift with little cost	Give a life insurance policy you no longer need	Current and possible future income tax
Avoid capital gains tax on the sale of a home or other real estate	Give the property to JA	An income tax deduction, plus the elimination of capital gains tax
Give your personal residence or farm but retain life use	Create a charitable gift while continuing to enjoy your home	A charitable deduction and a reduction in the value of your estate
Create a hedge against inflation over the long term	Establish a charitable remainder unitrust	A variable income for life and tax benefits
Reduce gift and estate taxes on assets you pass to your children and grandchildren	Create a charitable lead trust that pays income to JA for a specific term of years	A gift or estate tax deduction and your family keeps the assets
Make a revocable gift during your lifetime	Name JA as the beneficiary of assets in a living trust	Full control of the trust and its assets for your lifetime

Your investment today will directly impact tomorrow's workers and leaders, for generations to come – enabling students to be prepared to succeed and in doing so ensure their community thrives.