

GIFT PLANNING

TOP GIFT TYPES

These are the most common gift planning gift types. Keep these options in mind as you decide which work best for your philanthropic goals.

For more information, contact:
Your trusted tax advisor,
attorney, or plan administrator
for assistance if interested in a
planned giving strategy to
benefit Mecklenburg County
Council, Scouting America.



BEQUESTS

Bequests can include cash, investments, real estate, or anything of discernible value that the charity would receive at the donor's passing.



QCDS

(FOR AGE 70.5+)

These are all highly liquid assets typically invested in public markets, allowing for easy transfer to charities.



DONOR ADVISED FUNDS

A charitable giving fund that the donor sets up with benefits including simplicity, flexibility, privacy, and growth.



LIFE INSURANCE

Donors may decide that a life insurance policy is no longer needed and it can be donated to charity. They can also take one out specifically to benefit a charity.



ANNUITIES

Donors can give a lump sum to a non-profit and receive recurring payments for a fixed period or for life.



SECURITIES

Donors can give away shares of publicly-traded stocks, bonds, mutual funds, and other securities.



REAL ESTATE

Donors can give away real estate. In some situations they can even continue to live in the house they gave away for the remainder of their lives and still take a tax deduction for their gift.



EXPLORE FURTHER!

Ready to create your legacy? Let us help you find a planned gift that provides benefits like simplicity and flexibility while supporting the future of Scouting.