

GIFT PLANNING

TOP FOUR VEHICLES

BEQUESTS

A bequest is a donor's commitment to include a charity in their will. Donors can choose to give away a specific dollar amount, a percentage of their estate, or specific assets including cash, investments, real estate, or many other asset types.

BENEFITS TO DONOR:

Creates a lasting legacy that connects their values with their estate plans, potentially avoid various estate taxes.

HOW TO GET STARTED:

Contact your estate planner to begin the process. You can also work with your estate attorney to include our council in your will using our tax ID.

Mecklenburg County Council,
BSA
Tax ID: Call us at 704.342.9328

DONOR ADVISED FUNDS

A donor advised fund (DAF) is a type of charitable giving account a donor can open with investment advisors or community foundations. The funds are then invested by the fund manager and the donor can make gifts from the DAF over time.

BENEFITS TO DONOR:

Immediate tax deduction in most cases: simplicity, privacy, flexibility, and growth.

HOW TO GET STARTED:

To set up a Scouting DAF, contact giftplanning@scouting.org. To give from an existing DAF, contact your DAF custodian. For more details, contact our Council at:

mccscouting.org/giftplanning or
daniel.holden@scouting.org

QUALIFIED CHARITABLE DISTRIBUTIONS

A qualified charitable distribution (QCD) is a gift that donors aged 70.5 and older can make from an individual retirement account.

BENEFITS TO DONOR:

May reduce income taxes and estate taxes. State laws may vary.

HOW TO GET STARTED:

Contact your retirement account manager to begin the process.

GIFTS OF SECURITIES

A gift of securities is a gift of publicly traded stocks, bonds or mutual funds that can be easily facilitated between an investment management company (Fidelity, Schwab, etc.) and a charity.

BENEFITS TO DONOR:

May help donor avoid capital gains tax.

HOW TO GET STARTED:

Instruct the donor to contact their investment manager to start the process or to complete the gift transfer packet and return it to our Council's giving contact:

Director of Development,
Daniel Holden at
daniel.holden@scouting.org