

## Bequest

You can remember Interfaith Outreach & Community Partners in your will or living trust by establishing a specific amount, a percentage of your estate, or giving the remainder of your estate to Interfaith after you have taken care of your heirs and loved ones.

## Charitable Remainder Trust

A charitable remainder trust allows you to make a gift while providing income for you and your beneficiaries for life. The assets remaining in the trust would pass to Interfaith Outreach. This option is most attractive to individuals in their 50's and 60's with highly appreciated assets.

## Charitable Lead Trust

A charitable lead trust is the reverse of the Charitable Remainder Trust. A Charitable Lead Trust allows you to make a gift of income to the organization for a specified period of time (which could be your lifetime). At the end of that time, the assets remaining in the trust would pass to your designated beneficiaries. This option is most attractive to individuals who do not need the income currently but who do want the assets to eventually pass to their beneficiaries.

## Charitable Gift Annuity

Persons 65 or older can take advantage of a charitable gift annuity, which provides you with a guaranteed income for the rest of your life upon making the gift. Income from the annuity can be immediate or deferred, and can be given to you, your spouse, or other designated beneficiaries.

Please call 763-489-7512 if you have any questions.

Check out [iocp.org](http://iocp.org) for more information

## LOCATION:

1605 County Road N  
Plymouth, MN 55447

## OFFICE HOURS:

Monday-Saturday  
9 a.m.-5 p.m.

## QUESTIONS?

Please email Jill Kohler  
at [jkohler@iocp.org](mailto:jkohler@iocp.org) or  
call 763-489-7512

## THANK YOU!



**Interfaith Outreach**<sup>™</sup>  
*Igniting the power of community*

# LEGACY GIFTS

## Retirement Plan

Gifts of retirement assets, such as a Pension Plan or Individual Retirement Plan (IRA), may permit you to give more than you thought possible, while eliminating taxes that may otherwise consume those assets. Leaving all or part of your retirement account to Interfaith Outreach & Community Partners removes it from your taxable estate at your death or the death of your spouse.

## Life Insurance

Gifts of life insurance policies offer excellent tax benefits. Giving a life insurance policy allows you to donate an asset you may no longer need, for example, a policy that at one time assured the economic security of your spouse or children. Another option is to establish a new life insurance policy naming Interfaith Outreach as the beneficiary. There are significant tax benefits when you allow a charity to own your policy, or by making Interfaith Outreach the irrevocable beneficiary.

## Stock

There are also tax benefits to a gift of stock, depending on how long you've held the stock. If you sell the stock and donate the proceeds, the capital gain counts as income, which might impact your total taxes. If you donate the stock itself, you don't recognize any income.

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