



FORMING FUTURE LEADERS FOR THE CHURCH



### Just a few examples:

Your personal and family financial goals – retirement saving, estate planning, and overall quality of life – are essential and valued objectives along with your philanthropy.

#### **Good news!**

There are hundreds of opportunities to combine your charitable planning with other financial goals to achieve the most with your assets.

- ★ **Make a charitable gift and receive income for you and/or others.**
- ★ **Reduce income tax, and reduce or eliminate capital gain tax or gift and estate taxes.**
- ★ **Establish a series of annual gifts to the Foundation that may actually enhance the net estate to your heirs.**
- ★ **Find new solutions to benefiting from unproductive property such as real estate or personal property, or from illiquid assets like closely-held business interests, retirement accounts, and stock options.**
- ★ **Expand the available options for tax-advantaged retirement saving and income planning.**
- ★ **Transfer a family business and secure your retirement with minimal cost.**
- ★ **Enhance your charitable giving to the Foundation well beyond the level you thought was feasible.**

### **How can the Gregorian University Foundation be of assistance?**

Charitable planning is a highly specialized skill. We have staff specialists and resources available to support both your investigation and implementation of gift planning techniques. Our services are professional, confidential, collaborative and provided without cost or obligation. We encourage you to call on us to assist you, your family and advisors in exploring charitable opportunities in estate and financial planning.

## **Gregorian University Foundation**

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