

create abundance



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'tis the season of giving

Together Women Rise  
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## what's new in 2022

- | expiration of 2020 and 2021 charitable deduction benefits:
  - | \$300 above the line deduction
  - | cash contributions deductible up to 100% of your adjusted gross income.
- | standard deduction is \$12,950 for single filers or \$25,900 for married couples filing jointly



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## from the simple to the complex

- | cash
- | appreciated stock
- | qualified charitable distribution (QCD)
- | donor advised fund
- | charitable annuity/uni trust
- | legacy giving



## gifting long-term appreciated securities

- | make a gift and eliminate your tax liability
- | rebalancing your portfolio
- | concentrated exposure to a single stock
- | emotional attachment? gift and buy again
- | five-year carry forward for investment gifts in excess of 30% of your adjusted gross income



# gifting long-term appreciated securities





celebrating 70.5





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## a qualified charitable distribution (QCD)

- | must be 70.5
- | Individual Retirement Accounts
- | \$100,000 maximum annual distribution
- | must be payable directly to a charity

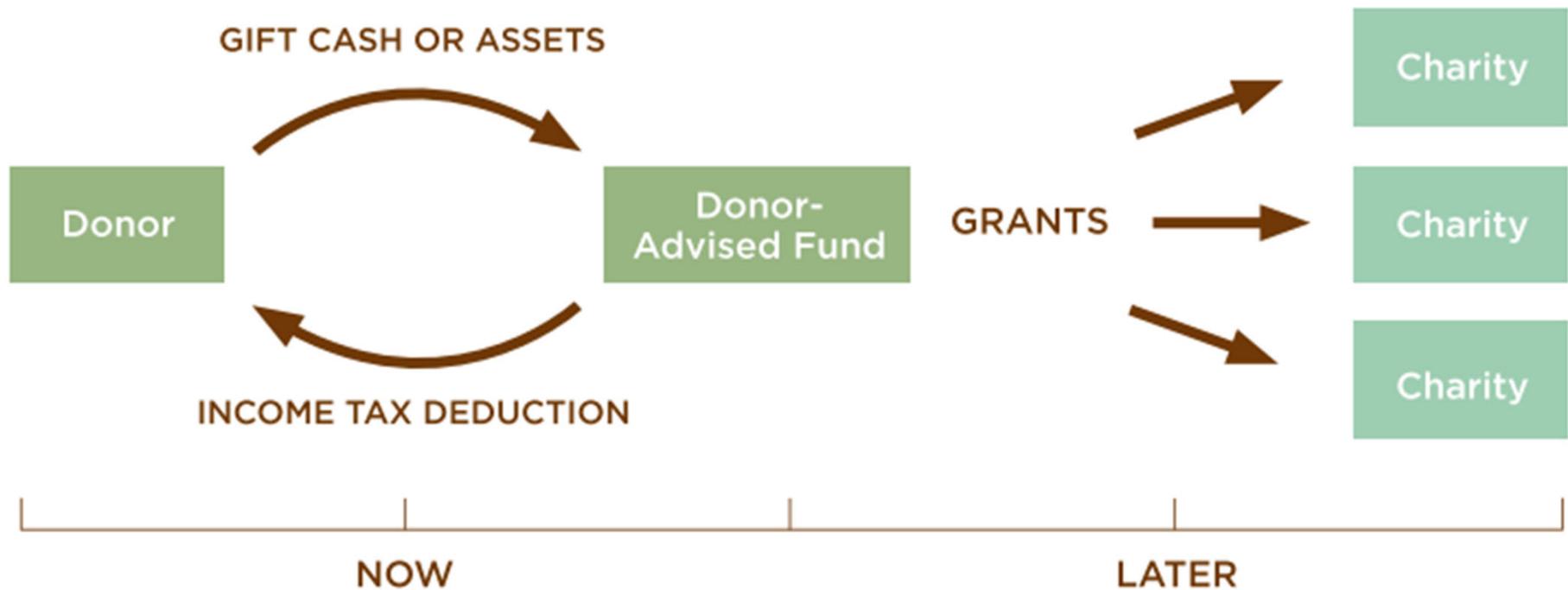


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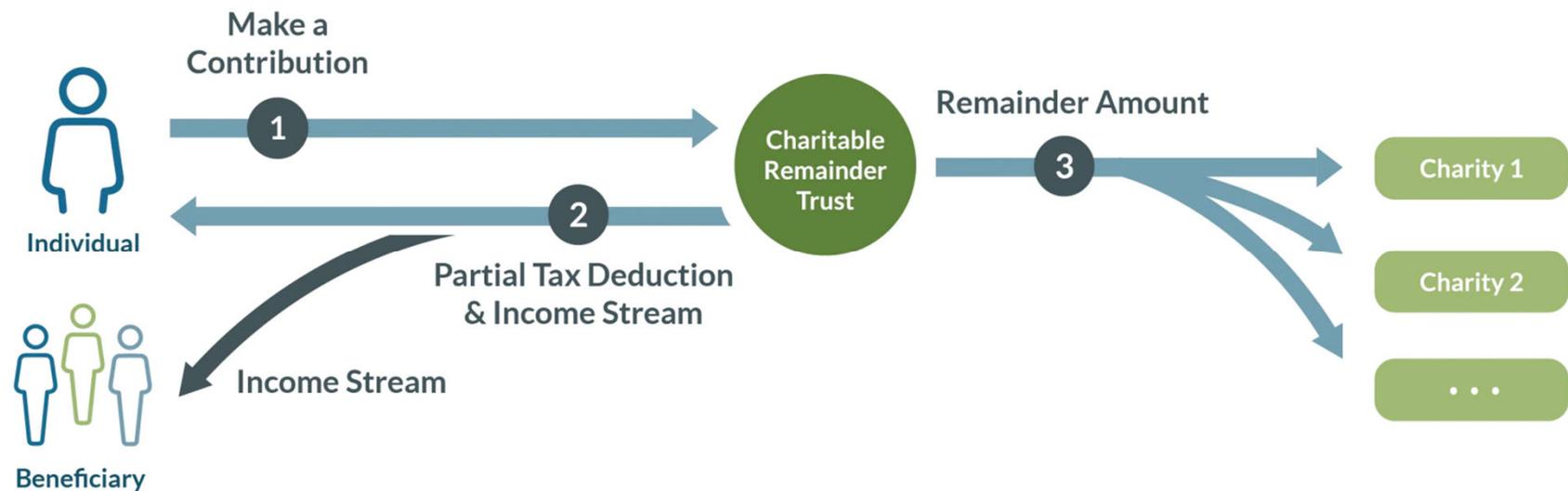
## donor-advised funds (daf)

- | donate cash, stock or other assets
- | immediate tax deduction
- | support charities now or over time
- | grow your donation, tax-free
- | engage the next generation
- | QCD versus a gift to a DAF

# the donor advised fund



# charitable remainder annuity / uni trust



and when I die





# legacy planning

- | beneficiary designation of retirement plans or life insurance
- | charitable remainder trust
- | consider a tithe or a split with children of the world
- | write an ethical will



## call to action

- | tomorrow – time, talent, treasure, ties
- | pick three items from the resource list
- | block time on your calendar [ **and then double it** ] to discuss your vision and values with family or friends
- | consult with your tax advisors



# resources

| [Gender Matters in Philanthropy philanthropy.iupui.edu/institutes/womens-philanthropy-institute/index.html](http://philanthropy.iupui.edu/institutes/womens-philanthropy-institute/index.html)

| [Giving by and for Women: Understanding high-net-worth donors' support for women and girls IUPUI Women's Philanthropy Institute](#)

| [Fidelity Charitable Gift Fund](#)

| [The Forever Letter: Writing What We Believe for Those We Love: Zaiman, Elana](#)

| [Money and the Meaning of Life: Jacob Needleman](#)

| [Money is power. And women need more of both. nytimes.com/2018/03/10/sunday-review/women-money-politics-power.html](http://nytimes.com/2018/03/10/sunday-review/women-money-politics-power.html)

| [Raising Financially Fit Kids: Joline Godfrey](#)

| [Schwab Charitable Fund](#)

| [The Opposite of Spoiled: Ron Lieber](#)

| [Vanguard Charitable Endowment Fund](#)

| [Women, Wealth and Giving: The Virtuous Legacy of the Boom Generation Margaret May Damen and Niki Nicastro MuCuiston](#)

| [21/64 Next Generation Philanthropy: 2164.net](http://2164.net)

