

A FAR GREATER GIFT

Ways to Give



4 WAYS TO LEVERAGE YOUR RESOURCES FOR A FAR GREATER GIFT

1. INCLUDE WORLD RELIEF IN YOUR WILL OR TRUST.

Including a gift to World Relief in your will or trust is the most common and often the simplest way to make an end-of-life gift. Through a bequest in your will or trust, you can leave a percentage of your estate, a specific amount of money or the remainder of your estate after your gifts to other loved ones. We can supply language for your attorney at your request.

2. MAKE WORLD RELIEF A BENEFICIARY OF YOUR RETIREMENT FUNDS.

When it comes to passing down assets to successive generations of your family, not all assets are created equal. Some assets such as those held in an IRA, 401(k) or 403(b) would be considered income and are taxable to your heirs at their tax rate. There is, however, no tax on the distribution of the IRA if given after death to a charitable organization like World Relief. Generally, to enact this type of gift you can contact your retirement fund administrator to secure a beneficiary designation form. It is easy to make changes in the future, too.

3. MAKE AN ASSET-BASED GIFT AND RECEIVE AN INCOME FOR LIFE.

Often people need most or all of the value of their assets to generate income for them while they are alive, and then they pass those assets down to heirs or a charity at the end of life. But there are ways to leverage the value of those assets now so that you can receive lifetime income, lower your current income tax burden and make a gift to charity now and at death. There are two life income opportunities - Charitable Remainder Trusts and Charitable Gift Annuities. For more information on either of these, please contact us at PlannedGiving@wr.org.

4. GIVE A LIFE INSURANCE POLICY

Gifts of life insurance can be a great way to leverage a little today into a lot tomorrow. Life insurance gifts often have lots of flexibility in the way they can be made. Please contact us at PlannedGiving@wr.org for more information.

