

Planned Giving

Some giving requires advanced planning



Leave your hard-earned resources to loved ones, your charitable interests, and your community.

Consider adding an additional “child” to your estate plan, a “child called charity.”

Give more than you ever thought possible

Many people like to include a charitable gift in their wills or trusts. When you combine your overall financial and estate planning with such planned gifts, you can minimize your tax burden, provide for your family, honor loved ones, preserve your family name, and reinforce your personal values. Furthermore, you can make significant charitable contributions to your favorite causes—gifts that may not be possible in your current financial position. Sometimes you can also receive income during your life in exchange for a charitable gift.

Do you want to:

- **Avoid tax on retirement plan assets?** Name CFHZ a beneficiary of this most heavily taxed asset and leave other assets to family.
- **Give charitably from your estate while providing adequately for your family?** Let us introduce you to the concept of “child called charity.”
- **Defer a gift until you know you will not need the resources?** Consider a bequest in your will or trust.
- **Supplement income for life and make a charitable gift at the same time?** Establish a charitable gift annuity or a charitable remainder trust.
- **Reduce gift and estate tax when passing assets on to family?** Consider a charitable lead trust.
- **Make a significant gift at little cost to you?** Name CFHZ a beneficiary of an existing life insurance policy.

Distributing your estate’s charitable gifts

CFHZ offers you flexible options to make distributing the charitable portion of your estate simple for your estate executor and easy for nonprofit recipients. You choose your favorite nonprofits, including local, national, or religious organizations, and specify how much you want each organization to receive. We distribute the charitable gifts on your behalf, either in a lump sum or in annual distributions over a period of years determined by you. Partnering with us saves you money now and time later when giving through your estate plan.

We’re ready to help you:

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