

## Together Estate Planning Gifts

*The simplest way to make a gift is in the form of cash, check or money order. Gifts of Securities and other Appreciated Property or Appreciated Assets are valuable gifts. No capital gains tax is due on the appreciation and you receive a charitable deduction for the full fair market value.*

### *Charitable Bequest*

Bequests by wills, irrevocable trusts and revocable trusts are an important way in which Together builds its capacity and plan for the future. Bequests can be for a specific amount, a percentage of your estate or a stated percentage of the residual amount of your estate. Considerable estate taxes may be avoided by naming Together in your will. For example, an IRA, 401(k) and other qualified retirement plan may be subject to estate and income taxes that can be a significant amount of their value. These investments come to Together tax-free, when bequeathed.

Together urges you to seek the advice of your attorney, accountant, banker, broker or other financial advisor, and we suggest you and your financial counsel consult our staff before reaching a final gift decision.

### *I would like more information on making a Planned Gift to Together*

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

***I am interested in:*** (check all that apply)

- Providing for Together in my will
- Or, letting you know that I have already included Together in my will through \_\_\_\_\_.
- Making a gift of appreciated securities
- Other \_\_\_\_\_

