



Planned Giving

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Groups audience: SVS Foundation

Planned giving is a strategy that helps donors maximize the personal benefits of their charitable giving, and allows them to make extraordinary gifts possible. Gift or estate planning enables donors to integrate generosity with tax planning to attain mutually beneficial outcomes. This type of charitable commitment typically comes from a donor's assets rather than their income and can be made outright or deferred.

Through careful planning and advantageous state and federal tax laws, it is possible to reduce or virtually eliminate income taxes such as capital gains, and transfer taxes including estate and inheritance taxes. Planned giving is a long-term development strategy that will maintain the legacy of giving created through the SVS® Foundation.

There are several benefits to remembering the SVS Foundation in your estate plan. With both immediate and long-term fiscal advantages, the SVS Foundation Legacy Society can offer you creative and innovative ways of protecting your assets.

- Reduce your income, capital gains (possibly avoiding), and/or estate taxes
- Increase current income for you and other family members
- Retain control of your assets now and reducing estate taxes in the future
- Have the peace of mind that you are protecting your family's financial security while helping fund a cause close to you
- Pass assets to family members at a reduced tax cost
- Make a significant charitable gift to the SVS Foundation
- Take advantage of a program that offers mutually beneficial outcomes for SVS Foundation and you

Contact SVS Foundation at 312-334-2300 or SVSFoundation@vascularsociety.org about making a Planned Giving contribution.

Planned Giving Strategies

- Will/Revocable Trust
- Charitable Lead Trust
- Charitable Remainder Trust
- Charitable Gift Annuities

- Life Insurance
- Estate Trust

How do I Make a Planned Gift?

There are numerous ways in which you are capable of making a planned gift and the mechanism should be tailored based on your personal situation. Planned gifts may be donor directed. If you have a specific interest in research or education, the SVS Foundation will restrict your gift for the appropriate use. SVS Foundation advises that you seek legal counsel from your estate attorney if you believe a planned gift is right for you.

Donor Recognition Program

The SVS Foundation Planned Giving Program is a visionary initiative established to provide an alternative giving mechanism for its constituents. Individuals making planned gifts to SVS Foundation will be recognized in an appropriate manner. To acknowledge their visionary support, donors will receive:

- Special designation in the SVS Foundation Annual Report
- Recognition through promotion of members at the Vascular Annual Meeting
- Invitations to all SVS Foundation donor activities and events
- Annual acknowledgments in SVS publications

Planned Giving Methods and Benefits

Type of Gift	Purpose	Revenue/Income	Taxation	Features
Will/Revocable Trust	Transfers assets to SVS Foundation upon death	Assets remain under the control of donor	No limit on estate tax deductions for charitable gifts	May be modified at any time
Charitable Lead Trust	Reduces Tax liability of significant assets	Income paid to SVS Foundation for specific time with asset reverting back to donor	No appreciation tax consequence at termination of terms	Beneficial to passing assets to heirs with reduced estate taxes
Charitable Remainder Trust	Aids in dispersing appreciated assets	Income paid to donor at a predetermined rate with SVS Foundation gifted the asset	Donor can take tax deduction on asset with payments taxable based on individual situation	Can be powerful estate planning that provides income stream for donor
Charitable Gift Annuities	Creates a lifelong revenue stream at favorable rates	Fixed income paid according to a preset schedule	Taxation may be at ordinary rates, as capital gains, or tax-free if qualified	Useful for meaningful gifts with income backed by SVS Foundation
Life Insurance	Uses insurance to make charitable gift	Policy paid by donor for the benefit of SVS Foundation unless fully funded	Premium payments deductible with initial surrender value taken when gift is made	Means of making large gift for someone with limited cash flow or a paid up policy

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Type of Gift	Purpose	Revenue/Income	Taxation	Features
Life Estate Trust	Donates a home to Foundation but live in residence	Donor is responsible for maintenance of asset, insurance, and taxes	No probate	Useful when a donor has no heirs and a irrevocable gift to SVS Foundation