

# Quick Planner

It is not difficult to put a gift planning arrangement in place. There are a number of ways that you can provide for St. Anne's as well as yourself and your loved ones. This one page quick-planner summarizes different commonly used instruments to help you make decisions based on what is important to you.

	Will/ Living Trust	Designation	Charitable Gift Annuity	Charitable Remainder Trust	Retained Life Estate	Promised Gift
<b>I would like to make a gift:</b>						
During my life			X	X	X	X
Upon my death	X	X	X	X		x

<b>I have the following assets available to make a gift:</b>						
Cash	X		X	X		
Securities	X		X	X		
Retirement Assets		X				
Life insurance policy		X				
Financial account		X				
Real estate	X			X	X	
Other	X			X		X

<b>Benefits that are important to me are:</b>						
Income			X	X		
Income tax deduction			X	X	X	X
Estate tax savings	X	X	X	X	X	X
Capital gains tax savings			X	X	X	X
Avoid probate		X	X	X	X	X
Lifetime control of assets	X	X			X	X

<b>If my gift provides income, I prefer that it is :</b>						
Fixed			X	X		
Variable				X		

*Please note that we are not giving legal or financial advice and none of the information provided should be interpreted as such. We encourage you to consult with your own legal counsel or financial advisor before deciding whether or not to proceed with a legacy gift.*

