



PLANNED GIVING

Leaving A Legacy Of Faith & Learning

WHAT IS PLANNED GIVING?

Planned gifts have wide-reaching effects, not only for Jupiter Christian School, but for our dedicated donors as well. Here is a simple breakdown of the benefits of this kind of giving:

NONPROFIT BENEFITS

- ✓ Greater chance of long-term stability
- ✓ Tap into the highest level of donor pyramid
- ✓ More major gifts

DONOR BENEFITS

- ✓ Tax deductions
- ✓ Support your passion(s) for years to come
- ✓ Cement a philanthropic legacy

TYPES OF PLANNED GIFTS:

Type	Highlights	Donor Income	Donor Tax Implications	End-of-Term Actions
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DEFERRED DONATION

Charitable Bequests	• Most popular • Receive cash when donor passes	None	N/A	N/A
Retirement Plans and Life Insurance	• Retirement assets or life insurance policies • Has the potential to be quite large	None	N/A	N/A

IMMEDIATE DONATION

Charitable Gift Annuities	• Irrevocable cash gift • Donors make an impact during lifetime, while securing their financial future	Fixed income for term	Option for immediate tax deduction	N/A
Charitable Remainder Annuity Trusts	• Donor contributes a gift (cash or assets) during their lifetime	Fixed percentage based on value of initial assets	Avoid related capital gains and estate taxes	Remaining balance goes to the nonprofit
Charitable Remainder Unitrusts	• Any asset type (real estate, stock, etc.) • Very versatile • Donor's income stream is shielded from inflation	Fixed percentage of fair market value of asset	Avoid related capital gains and estate taxes	Remaining balance goes to the nonprofit
Charitable Lead Trusts	• Any asset • Often chosen by wealthier donors due to reduced taxes	Fixed stream of income	Reduced estate taxes	Assets go back to the donor or their beneficiaries



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Your Jupiter Christian School Legacy Of
Faith & Learning
Begins With The Plans You Make Today.



To Learn More About Our
Planned Giving Options, Please Visit:

www.jupiterchristian.org/giving/planned-giving

If You Wish To Discuss Planned
Giving Options, Or Have Any Questions,
Please Contact Chelsea Gunn:

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