

# Blended Gifts Make Your Giving Go Further



See the impact of  
your giving today,  
and support our  
cause in the future

Mount   
Saint Mary's  
University  
LOS ANGELES

**100**  
UNSTOPPABLE  
YEARS

# What Is a Blended Gift?

A blended gift combines the power of a current or annual gift with a planned gift. Combining your gifts can be a very attractive way for you to achieve your financial and estate planning goals while helping further our mission.

You can  
make a  
significant  
impact  
today and in  
the future.



## Blended Gift Strategies

In addition to making your annual gifts to us this year, you might consider the following:

- Gifts of non-cash assets, such as securities, real estate or business interests
- Charitable life income plans, including charitable gift annuities and charitable remainder trusts
- Bequests and/or beneficiary designations of IRAs, financial accounts or life insurance policies

# How Blended Gifts Benefit You

- Increase the impact of your giving now and in the future
- Preserve wealth for you and your family
- Enhance your financial security
- Enjoy greater tax savings
- See the results of your giving today

## How Blended Gifts Work

A charitable life income gift can be added to your annual gifts to enhance your financial security, increase the impact of your giving, provide greater tax savings and leave a future legacy gift to further our mission.

### 1. Make a Gift Today



ASSET



ASSET TO  
CHARITY

### 2. Plan for Tomorrow



ASSET



BEQUEST OR  
OTHER  
PLANNED GIFT



ASSET TO  
CHARITY

Like many of our longtime supporters, you may desire to make a significant gift but you may not be ready to make a large gift today. This type of gift may be possible if your gift is made through your will or trust or as a beneficiary designation gift.

If you have already included a bequest in your will or have created a planned gift, you can begin to see the current impact of your giving by adding outright gifts of cash or property today. You can avoid capital gains tax by making a gift of real estate, stock or other appreciated investments.

# Definitions

## Charitable Life Income Plans

Giving plans where you can make a gift of an asset and in return receive a lifetime stream of payments. Upon your passing, the remainder principal is distributed to one or more charities.

## Beneficiary Designation

Leaving a financial account, retirement account or insurance policy to another person, trust or an organization using a simple form, typically provided by a financial services or insurance company. The beneficiary can be one or more individuals and/or organizations, such as a trust or charity.

## Planned Gift

A planned gift is a charitable gift where the donor takes steps today to arrange for a gift that will benefit us in the future. Bequests, charitable gift annuities and charitable trusts are common forms of planned gifts.



## Let Us Help You

There are numerous ways to structure blended gifts depending on your unique personal situation. We can help you create a blended gift strategy to achieve your goals while supporting our mission. Please contact us to learn more.

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