

Tax-Wise Charitable Planning Strategies



There are a number of charitable planning strategies that can help you lower your income and taxes this year.

Here are some ways you can shift tax dollars to charitable dollars and support a cause like ours.

How Can We Help?

- Please contact me with more information about end-of-year giving strategies.
- Please contact me with more information about planned gifts and estate planning strategies.
- I have already included your organization in my will or trust.

The best way to contact me is by:

- Email
- Mail
- Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

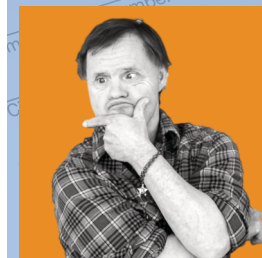
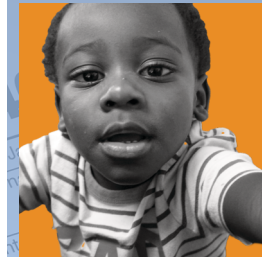


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Keeping the year going strong



Tax planning doesn't have to start at the end of the year.



✓ IRA Charitable Rollover

Congress made permanent the law that allows people age 70½ or older who own an IRA to make cash gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution. Contact us to learn more.

✓ Outright Gift of an Asset

If you wish to make a gift to support our cause this year but are concerned about preserving your cash resources, consider a gift of an appreciated asset. A gift of securities, business interests or real estate can provide you with significant income and capital gains tax savings, often exceeding the benefits of a cash gift.

✓ Donor Advised Fund (DAF)

If you are looking for an end-of-year deduction but want more time to make thoughtful giving decisions, consider a donor advised fund (DAF). Our organization can use your tax deductible gift to establish a DAF in your name. You can make grants from your DAF now and in the future to support our work and other causes you care about.

✓ Zero-Tax Gift and Sale

If you are planning to sell an asset like securities, real estate or a business, before you sell, consider a "zero-tax" charitable gift and sale. By making a gift of part of the asset before the sale, you can use a tax-saving charitable deduction to significantly lower or eliminate the capital gains tax on the sale.

Consider these worthwhile strategies before the year's end.



Selling securities, real estate or a business this year?

Consider planning strategies to avoid capital gains tax



Age 70½ or older?

Make a gift from your IRA



Own an IRA and/or 401(k)?

Maximize your deductible contributions



Expect to be in a higher tax bracket?

Talk to your tax advisor for solutions to manage taxes



Expect to be in a lower tax bracket or can control income?

Shift income to this year



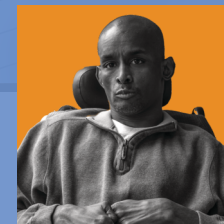
Have investment losers?

Sell to offset winners and lower your capital gains tax



Extra medical expenses?

Establish a health savings account (HSA)



Have state taxes, property taxes, medical bills?

Accelerate deductible expenses

May We Help? Email us at Development@Momentum4All.org

If you would like further information on these end-of-year planning strategies, please contact us. We can help you create a plan that meets your needs and goals.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.