

# Five Easy Ways to Benefit Yourself, Your Family and Congregation Beth Am Through O

Giving

## *An Outline of O Giving Opportunities and Benefits*

<b>If your goal is to...</b>	<b>Then you can...</b>	<b>And the benefits are:</b>
Make a deferred gift while avoiding any set-up expenses	Name Beth Am as a beneficiary of your IRA simply by changing the name on your form	IRA funds can be subject to both estate and income taxes; helps you give more instead of paying more taxes
Defer a gift until after your lifetime or your spouse's lifetime	Leave a bequest of cash, property or a share of your estate to Beth Am	Donations are fully exempt from estate tax
Make a revocable gift during your lifetime	Name Beth Am as the beneficiary of assets in a living trust for your lifetime	Full control of the trust terms during your lifetime
Avoid capital gains tax on the sale of a home or other real estate	Donate the property to Beth Am (with the option of continuing to live in the home, or "retained life estate")	Income tax deduction plus reduced or eliminated capital gains tax
Gain tax benefits and a hedge against inflation during your lifetime	Establish a charitable remainder unitrust naming Beth Am as the beneficiary	Immediate tax deduction, income during your lifetime, and a meaningful gift to Beth Am upon your death

*For a private discussion about giving options, please contact Mandy Eisner, Director of Development, at (650)493-4661 ext. 504 or [Mandy\\_Eisner@betham.org](mailto:Mandy_Eisner@betham.org)*