By factoring in a donor's personal tax, financial, and estate circumstances and goals, a planned gift provides maximum tax benefits to you, while making a significant difference to EmpowerTech. Planned gifts can be made during your lifetime, or posthumously. If you are interested in discussing a possible planned gift, please contact Joan Anderson (310) 338-1957 ext 305.

Bequests: By including a bequest provision in your will or irrevocable trust, you can direct assets to EmpowerTech. You still own and control the specified assets during your lifetime and you can modify the bequest at any time.

Pooled Income Fund: Much like a mutual fund, by directing cash or securities to a Pooled Income Fund established by EmpowerTech, you or whomever you designate will receive ownership units in the fund that produces annual income for life. The income typically exceeds average returns on stock portfolios and it allows you to donate appreciated securities without paying capital gains taxes. At the time of the death of the unit holder, the principal attributed to that unit holder will pass to EmpowerTech.

Charitable Gift Annuity: By giving cash or securities to EmpowerTech now through a Charitable Gift Annuity, you can set up a fixed income for life for you or up to two individuals. The full amount of the cash or securities passes to EmpowerTech, allowing you to take an immediate tax deduction for a portion of your gift, and your annuity payments are made from the investment income generated by your gift. You can defer taking receipt of your annuity payments until a specified future date, and the longer you defer, the higher the effective rate of your annuity. Annuity payments are subject to a variety of different tax treatments, so it is important to consult your tax advisor before making your gift.

Charitable Lead Trust: By contributing cash, securities or real property to a trust that makes fixed annual payments to EmpowerTech, you can make a significant contribution to EmpowerTech and still pass on these assets to your heirs. When the trust ends, the assets pass on to your heirs. You can specify the amount of the annual payment and the length of the trust, and all asset appreciation within the trust will ultimately pass to your heirs, tax-free.

Charitable Remainder Annuity Trust: Contribute cash, securities or real property to a trust

that makes fixed annual payments to you or whomever you designate. This provides a stable source of income for years, an immediate tax deduction for the assets you donate to the trust, and exemption from capital gains taxes on any appreciated assets that you donate to the trust.

Charitable Remainder Unit Trusts: Contribute cash, securities or real property to a trust that annually pays a percentage of the market value of the assets in the trust to whomever you designate. The assets are re-valued every year. At the end of the trust, the assets in the trust pass to EmpowerTech. This provides a stable source of income for years, an immediate tax deduction for the assets you donate to the trust, and exemption from capital gains taxes on any appreciated assets that you donate to the trust.