



	Gifts after your lifetime		Gifts during your lifetime		
	<b>BEQUESTS</b> 1	<b>BENEFICIARY DESIGNATION</b> 2	<b>APPRECIATED SECURITIES</b> 3	<b>QUALIFIED CHARITABLE DISTRIBUTION (QCD)</b> 4	<b>DONOR ADVISED FUND</b> 5
	Include Mercy Health Foundation in your Will or Trust	Name the Foundation as a beneficiary on assets with a beneficiary designation	Give stock that has increased in value	Contribute from your IRA directly to Mercy Health Foundation	A charitable investment account where you oversee the distributions
<b>AGE LIMIT</b>	None	None	None	70 1/2	None
<b>MINIMUM AMOUNT</b>	None	None	None	None	\$5,000
<b>YOUR TAX BENEFITS</b>	Estate tax deduction	Estate tax deduction	<ul style="list-style-type: none"> <li>Income tax deduction the year of your gift</li> <li>Avoid capital gains tax on highly appreciated assets</li> </ul>	<ul style="list-style-type: none"> <li>Satisfy your required minimum distribution (RMD) by making a QCD of up to \$111,000</li> <li>Reduce your taxable income</li> </ul>	<ul style="list-style-type: none"> <li>Income tax deduction the year of your gift</li> <li>Growth of investment is tax free</li> </ul>
<b>REASONS TO CHOOSE THIS GIFT</b>	<ul style="list-style-type: none"> <li>Flexibility to change</li> <li>Retain access to assets</li> </ul>	<ul style="list-style-type: none"> <li>Flexibility to change</li> <li>Retain access to assets</li> </ul>	<ul style="list-style-type: none"> <li>Tax deduction</li> <li>Donate a low basis asset and avoid capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>RMDs are treated as ordinary income; having your RMD paid directly to the Foundation will</li> <li>Reduce your taxable income</li> </ul>	<ul style="list-style-type: none"> <li>Extend your giving over time</li> <li>You recommend when and which charities receive your donations</li> </ul>
<b>IS THIS GIFT IRREVOCABLE?</b>	No	No	Yes	Yes	Yes
<b>HOW TO MAKE THIS GIFT</b>	Name Mercy Health Foundation in your Will or Trust	Name the Foundation on the beneficiary designation form	Contact your gift officer or Brad Blandin for security transfer instructions	Contact your IRA administrator to request a Qualified Charitable Distribution from your IRA to the Foundation	Contact Brad Blandin to help you decide if a donor-advised fund is right for you