



Non-Cash Gifts - Making the Most of Charitable Giving

Cash gifts are commonly seen as a viable way to financially assist your favorite ministry but it is not your only option. Have you considered a non-cash gift as part of your estate plan?

Non-Cash gifts can include appreciated property like stocks, mutual funds, bonds, real estate, life insurance policies or charitable gift annuities. Because non-cash contributions require additional paperwork, review and approvals, we encourage donors to contact their financial advisors and our office when considering a non-cash contribution option.

Other simple things you can do to make a charitable gift can include:

- **Bank assets** - request POD (payable on death). Fill out new signature cards at your bank, naming one or more charities as the beneficiaries. Be sure to add specific identifying information to make sure the funds are directed properly.
- **Securities and other assets** can be directed by adding TOD (transfer on death) & POD designations listing a charity as the beneficiary.
- **Life Insurance** - request and fill out a change of beneficiary form, naming one or more charities. Be sure to add specific identifying information to make sure funds are directed properly.
- **Tax-Deferred Retirement Plan** (IRA, 401K etc) can be handled the same as life insurance policies

Note - In each of the above cases, your bequest may be outright, a percentage, the remains after gifts to loved ones, or a contingency if loved ones do not survive you.

When designating a charitable gift to *CEF* please list the following legal description in your documentation: *CEF of WI, Inc. of Southeast WI Chapter.*



CEF
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