



ORLANDO SHAKESPEARE THEATER

IN PARTNERSHIP WITH UCF

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Make a quick and easy gift to Orlando Shakes	Outright Gift	Donate cash, securities or personal property to OST	Income tax deduction; avoidance of any capital gains tax
Make a gift through a trust that takes place upon death	Living Trust	Name OST as beneficiary of assets in a living trust	Control of trust for lifetime; possible estate tax savings
Make a gift through your will that takes place upon death	Bequest in Will	Name OST in your will	A donation that qualifies for possible estate tax savings
Make a large gift with little cost to yourself	Life insurance gift	Name OST as beneficiary under a current life insurance policy	Donation should qualify for charitable deductions at death
Avoid the twofold (estate & income) taxation on retirement plan assets	Retirement Plan Gift	Name OST as beneficiary of your 401K or IRA (or similar type assets) at your death	Gift should qualify for charitable deductions at death by avoiding estate and income tax for heirs
Avoid capital gains tax on the sale of a home or other real estate	Real Estate Gift	Donate the property to OST, or sell it to us at a bargain price	Immediate income tax deduction and avoidance of capital gains tax
Secure a fixed and often increased income	Charitable remainder annuity trust	Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life or other term
Create a potential hedge against inflation over the long term	Charitable remainder unitrust	Create a trust that pays you on an annual basis a percentage based on "then current" value of trust assets	Immediate income tax deduction, annual income for life that has potential to increase or decrease
Reduce gift and estate taxes on assets passing to heirs	Charitable lead trust	Create a trust that pays a fixed or variable income to OST for a set term, and then passes to heirs	Reduced size of taxable estate; provides for family members (or other beneficiaries), often with reduced gift taxes