

GUIDE TO MAKING GIFTS OF NON-CASH ASSETS



When you donate non-cash assets, you want an efficient and straightforward process. Our experienced staff uses this simple, five-step approach to provide you with the best giving experience possible:

1. Define your charitable goals
2. Determine the best assets for giving
3. Determine the best giving method
4. Gather details on the asset
5. Asset transfer and sale

NON-CASH ASSETS WE ACCEPT

- Artwork
- Collectibles
- Crops
- Farm equipment
- Life insurance
- Livestock
- Publicly traded stock
- Virtual currency
- Retirement assets
- Privately held stock
- Real estate

HERE'S HOW IT WORKS

First, we help you define your charitable goals.

Make sure your gift accomplishes exactly what you want. Our staff has decades of experience guiding donors. We'll lead you through a robust goal development process to understand your charitable goals and create a giving plan that reflects your values.

Second, we work with you and your advisors to determine which assets might be best to give.

Some assets are more financially beneficial to give during life and some more beneficial after death. Some assets you still need. Others you may not. Taking all of this into account helps to narrow the right assets for your giving.

Third, we work together to determine the best giving method.

Gifts can be made in a variety of ways with various philanthropic tools. Once we know your goals and understand your assets, we can help you determine if a bequest, donor advised fund (DAF) or other gift method is best for your charitable goals. (At the end of this piece, you'll find a quick reference guide showing which assets can be used with the various gift methods.)

Fourth, we gather specific details about the asset you wish to give.

We gather data on the asset to make sure the gift is in everyone's best interest and poses no financial or legal difficulties. We also want to make sure there is a market for selling the asset after the gift is made.

Last, we will work with you to transfer ownership of the asset and begin the sale process.

We work hard to sell the asset as quickly as possible for the best possible price. After all, the ultimate goal is to give as much to your favorite causes as possible.



OUR PROMISE TO YOU

- + You will be guided each step of the way.
- + You will work with a local partner who will act in your best interest at all times.
- + Your goals are our goals.
- + You will get more than a transaction. You will get a trusted partner in giving.
- + You will work with a local team who knows the community.

GIFT METHODS GUIDE

ASSET	GIFT METHODS	Beneficiary Designation	Bequest	Charitable Remainder Trust	Donor Advised Fund	Gift Annuity	Retained Life Estate
	Artwork		X	X	X		
	Cash	X	X	X	X	X	
	Collectibles		X	X	X		
	Crops		X	X	X		
	IRA	X		***		***	
	Life Insurance	X			X		
	Livestock		X	X	X		
	Farm Machinery		X	X	X		
	Real Estate	***	X	X	X		X
	Stock (Private)		X	***	X		
	Stock (Public)	X	X	X	X	X	
	Virtual Currency		X	X	X	***	
	401(k), 403(b)	X		***	***		

*** Possibly, depending on circumstances

Start a conversation with a Gift Planner today.
Call 651.224.5463 or email the team at philanthropy@spmcf.org.