Swiss Village Giving Options

Giving Option	Definition	Goal	Benefit
Cash or Check	Giving an outright gift of cash or a check	Make a quick and easy gift, supporting Swiss Village and our mission	• Income tax deduction • Immediate impact on Swiss Village
Online Giving	Giving a gift online by credit card or through your PayPal account	To give a simple and easy gift rom the comfort of your own home	• Income tax deduction • Immediate impact on Swiss Village
Bequest	Naming Swiss Village as a beneficiary in your will	Retain control of assets during your lifetime and defer a gift until after your lifetime	• Estate tax deduction • Retain control of your assets during your lifetime • Membership in the Bethesda Club
Charitable Gift Annuity	In exchange for an irrevocable gift of cash or securities you receive a fixed sum twice a year for life while Swiss Village will receive the remainder	Secure a fixed income while avoiding market risks with possible tax benefits for life	• Income tax deduction • Fixed income for life, normally higher rate of return than from existing assets • Membership in the Bethesda Club
Retirement Plan	Naming Swiss Village as a beneficiary of your retirement plan	Maximize your heirs' inheritance	• Reduced estate and income tax for your heirs • Membership in the Bethesda Club
IRA Rollover	A qualified distribution transfer made directly from your IRA to Swiss Village. (Must be 70.5 to make this gift. Congress must approve this tax benefit.)	Exclude your IRA distribution from taxable income while making a required minimum distribution	• No itemizing your taxes to receive a tax benefit • Does not count against charitable deduction limitations • Simple & easy way to make a large gift
Life Insurance	Naming Swiss Village as a beneficiary of a life insurance policy	Make a large gift with little cost to you and turn an unneeded asset into a meaningful gift	• Income tax deduction • Membership in the Bethesda Club

Swiss Village Giving Options

Giving Option	Definition	Goal	Benefit
Wish List	Give a gift through Swiss Village's Wish List items	See your gift being used	• Income tax deduction • See your gift getting enjoyment and use • Immediate impact on Swiss Village
Memorial/ Honor Gift	Making a gift in memory or honor of a loved one	To honor the memory of a loved one or to celebrate milestones	• Income tax deduction • Thoughtful way to honor a loved one • Unique way to remember a life event
Securities	Give either publicly traded or closely held stock to Swiss Village. Closely held stock require additional approval	Avoid capital gains tax	• Income tax deduction (equal to the value of the securities on the date of the gift) • Avoid capital gains tax
Personal Property	Donate a collection or items for the enjoyment of those who use Swiss Village	Share your enjoyment of a collection or other items	• Charitable deduction based on the full market value of the item(s)
Real Estate	Give the gift of a home or land you no longer need	Avoid capital gains tax on the sale of a home or land	• Income tax deduction • Elimination of capital gains tax
Corporate Matching	Some businesses provide a match for contributions you make. (Talk with your employer's HR office to see if this is offered)	Make a larger gift than you might be able to on your own	• Income tax deduction • Immediate impact on Swiss Village • Increase the size of your gift
Corporate Gifts	If you are an owner or CEO of a business, you might consider making a corporate gift	To support Swiss Village and our mission	• Tax deduction • Immediate impact on Swiss Village

If you have any questions on any of the giving options or would like more information please contact Jennifer Lehman, Director of Development, at 260-589-4529 or JenniferL@SwissVillage.org.