



LEAVING A LEGACY TO THE VALLEY

CHOOSE THE OPTION | THAT MATCHES YOUR GOALS

YOUR GIFT	Bequest	Outright Gift of Cash	Outright Gift of Securities	Gifts of Retirement Assets	Gifts of Real Estate	Retained Life Estate	Gift of Life Insurance	Charitable Remainder Trust	Charitable Lead Trust
YOUR GOAL	Defer a gift until after your lifetime.	Make a quick and easy gift.	Avoid tax on capital gains.	Avoid the twofold taxation on IRAs or other employee benefit plans.	Make a gift of property no longer needed and generate an income tax deduction.	Give your personal residence or farm now, but continue to live there.	Make a gift with little cost to yourself.	Secure a fixed and often increased income, or create a hedge against inflation.	Reduce gift and estate taxes on assets you pass to children or grandchildren.
HOW TO MAKE THE GIFT	Name us in your will or living trust. (Designate a specific amount, percentage or share of the residue.)	Simply write a check or make cash donation now.	Contribute long-term appreciated stock or other securities.	Name SVF as beneficiary of the remainder of the assets after your lifetime.	Donate the property to SVF.	Designate ownership of your home to SVF, but retain occupancy.	Change ownership on a life insurance policy you no longer need.	Create a trust that pays income annually; principal is retained for charitable organization.	Create a charitable trust that pays fixed or variable income to us for a specific term of years; principal is retained for heirs.
YOUR BENEFITS	Donation exempt from federal estate tax. Control of your assets for your lifetime.	Immediate income tax deduction. Removes property from estate.	Immediate charitable deduction. Avoidance of capital gains tax.	Allows you to make the gift from the most highly taxed assets, leaving better assets for family.	Immediate income tax deduction. Reduction or elimination of capital gains tax.	Valuable charitable income tax deduction. Lifetime use of residence.	Current income tax deduction. Possible future deductions through gifts to pay policy premiums.	Variable or fixed income for life. Immediate income tax charitable deduction.	Reduces your taxable estate. Property kept by your family, often with reduced gift taxes.