

Ways to Give:

We invite you to consult with us on the many options available to leave a legacy of giving that will achieve your personal goals for charitable giving and ensure that the legacy of The Pankey Institute lives on. Donations to the L.D. Pankey Dental Foundation are tax-deductible to the full extent of the law. Tax ID: 59-1298070.

We also encourage you to consult your professional legal or financial advisor for tax advice specific to your situation.

Vehicle	Goals	Strategy	Benefits
Cash	Maximize your deduction; minimize the gift details.	Use <u>cash</u> to make your gift to The Pankey Institute.	Claim your deduction against a larger portion of your adjusted gross income, and make an immediate impact on The Pankey Institute.
Stocks, Bonds, Mutual Funds	Avoid capital gains liability and take an income tax deduction.	Use appreciated <u>securities</u> , instead of cash, to make your gift.	Buy low and give high – while avoiding capital gains tax.
Real Estate	Avoid capital gains tax on appreciated real estate.	Make an outright gift of real estate or consider a <u>bargain sale</u> or <u>retained life estate</u> .	Avoid capital gains liability and take an income tax deduction.
Bequest	Make a gift for The Pankey Institute's future that costs you nothing now.	Include a <u>bequest</u> for Pankey in your will (cash, specific property, or a share of the estate residue).	Today: a painless way to build our financial strength.
Retirement Plan	Leave more of your estate to your heirs.	Name The Pankey Institute as beneficiary of your <u>retirement plan</u> , leave less-taxed assets to family.	Eliminate income tax on retirement plan assets; free up other property to pass to your heirs.
Life Insurance	Create a long-term gift that won't draw funds from your estate.	Create a new <u>life insurance policy</u> , or donate a paid-up policy whose coverage you no longer need.	Increase your ability to make a significant gift to The Pankey Institute.
Charitable Gift Annuity or Charitable Remainder Trust	Get benefits back from the assets you give to The Pankey Institute — and thus afford a larger gift.	Make a contribution to a pooled income fund, or create a life-income plan like a <u>charitable gift annuity</u> or a <u>charitable remainder trust</u> .	Receive income for your lifetime; receive a charitable deduction; diversify your holdings.

Charitable Lead Trust	Reduce gift and estate taxes and leave more of your assets to your heirs.	Create a <u>charitable lead trust</u> to pay income to The Pankey Institute for a fixed time, then pay the remainder to your heirs.	Reduce gift and estate taxes, and freeze the taxable value of growing assets before they pass to your family.
Deferred Gift Annuity	Reduce high tax liability now; gain additional income later.	Establish a <u>deferred gift annuity</u> .	A larger deduction and a higher income rate than our other life-income gifts offer.