

Donor Activist Services

# Planned Giving

Liberty Hill takes the guesswork out of giving, helping you make smart philanthropic decisions that will make the greatest impact.



## Why Liberty Hill?

As your partner in philanthropy, **Liberty Hill** brings 40-plus years of social change expertise to the table to advise you on your giving decisions and ensure your generous gifts are making the greatest impact possible.



## Our Vision

**Liberty Hill** envisions a society built on racial, economic, environmental and social justice in which all people have a powerful voice, including those currently shut out of our democracy, people cut off from opportunities because they are poor, because of their skin color, because of their gender or sexual orientation, because of where they live, or where they were born. We will not rest until society provides **justice** and **equality** for all.



## Our Mission

**Liberty Hill** is a laboratory for social change philanthropy. We leverage the power of community organizers, donor activists and allies to advance social justice through strategic investment in grants, leadership training and campaigns.

# Create Your Own Legacy!

Making a difference is important to you. Philanthropic giving is an important part of your life and your core values. Like many people, you want to ensure resources for future generations of community leaders, grassroots activists and those committed to building a society that provides justice and equality for all.

The good news is you don't have to be Andrew Carnegie or Bill Gates to start a meaningful philanthropic legacy. In addition to supporting the work of Liberty Hill through cash donations, consider making a planned gift.

## What is Planned Giving?

**Planned Giving** is a win-win approach to philanthropic donations that supports your favorite nonprofit organization and can benefit you now or in the future. Have you ever made a vehicle donation to benefit your favorite charity? If you have, you know that transferring assets is easy and it can provide tax benefits as well. Simply put, "planned giving" is the transfer of assets to Liberty Hill during a lifetime or as part of an estate plan. This forward-thinking approach to giving is "planned" because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

## Gifts at a Glance

In addition to the satisfaction of making a meaningful gift, most planned gifts have immediate and/or long-term tax benefits. The chart below can help you find the type of gift that is right for you.

Consult with your financial advisor or estate planner and join the Liberty Hill Circle of Angels society today, by contacting your Advancement representative or emailing us at [advancement@libertyhill.org](mailto:advancement@libertyhill.org).

Donor Profile	How it Works	Donor Benefits	Gift Type
Donors of any age or income level	Gift of any amount through a will, trust, life insurance policy or IRA	Estate tax benefits	Bequest
Donor who have complex or appreciated assets	A gift of cash in return for <b>variable</b> payments (% of gift) Upon passing, remainder is distributed to the charity	Annual income that can adjust over time; act as hedge against inflation May avoid capital gains taxes on appreciated assets Income tax charitable deduction in year of gift	Charitable Remainder Trust
Donors who want to help Liberty Hill, have liquid assets (such as stocks, CDs, savings accounts) Donors who want to provide income for their parents or others	A gift of cash or stock in return for <b>fixed</b> payments to the donor for life Upon passing, remainder is distributed to the charity	Security of a fixed income for life Knowledge it is guaranteed by organization Income tax charitable deduction in year of gift	Charitable Gift Annuity
Donors who own their own homes	A gift of primary residence, vacation home or other property	Donor can continue to live in or use property Income tax charitable deduction in year of gift	Retained Life Estate

Anyone considering a planned gift should consult a tax and/or legal advisors to determine the consequences of making a gift.

### It's easy.

**Planned Giving** is easy to do and you don't have to be wealthy to do it. Whether it is naming Liberty Hill in your will or trust for a modest amount, or a gift of house and property, there is an easy option that is right for you.

### It can involve assets you might never think of.

A life insurance policy. Real estate. Stocks. Business holdings. A checking or savings account. These are all assets that can be leveraged in planned gifts.

### It can generate an income stream.

In return for the donation of real estate, stocks or other assets, donors can receive a series of regular payments.

### It can provide generous tax benefits.

Depending upon the type of gift, short-term and/or long-term tax benefits may apply. Donors at a variety of income levels can benefit. Be sure to consult with your financial or estate planner for more specifics.

### It can work in tandem with other family priorities.

Planned giving is not an "all or nothing" option. Gifts can exist side-by-side with other beneficiaries and personal priorities.

### It is long remembered.

Designating a planned gift automatically makes you a member of Liberty Hill's Circle of Angels society. As a member of this society, you will receive recognition annually in Liberty Hill's Impact Report, in our event publications and receive invitations to special events.

*"The impulse to take care of your children as a legacy for the future is natural. For me, it's as important to leave a legacy to Los Angeles, the community that's been so good to me. A planned gift to Liberty Hill is a perfect way to do that."*

### Sarah Pillsbury

Founder of Liberty Hill Foundation  
City of Angels Society Member