

## Alternative forms

**Cash.** Charitable gifts are often made in the form of cash or checks. When you itemize your tax deductions, gifts of cash may be used to eliminate federal income tax on up to half of your adjusted gross income. State income tax savings may also apply.

**Memorial donations.** Memorials are made to honor a living or deceased relative or friend, and they are a lasting and permanent tribute in their honor. Immediate family members or others are notified of the donation with a warm and considerate memorial card.

**Codicil.** If a donor's will is valid and up-to-date, he or she can instruct their attorney to prepare a codicil, which adds a beneficiary without having to rewrite the will.

**Provision by will.** Using this method of giving, the donor retains all income and access to property, as nothing is transferred prior to death. The gift can be for a specific amount, specific assets, a percentage of the estate or all or a portion of the remainder of the estate. The fair market value of assets may be deductible for the purposes of estate tax liability.

**Gift annuity agreement.** Similar to a unitrust, except for the fact that a gift annuity is a contract under which a charity—in return for a transfer of cash, marketable securities, or other assets—agrees to pay a fixed amount of money for the life of the contract rather than a percentage of the assets of the trust.

**Gifts of appreciated property.** Donating stocks, bonds, real estate, and other appreciated assets held long-term (12 months or more) are tax deductible at the current value rather than actual cost.

**Charitable remainder unitrust.** A unitrust allows donors to receive an income based on a percentage of the total value of the assets in the trust each year. At the expiration of the trust's term, the charity receives its assets.

## Gift-giving tips for charitable donations

**Budget for giving.** Wise giving takes a little bit of planning. If you wish to donate funds to a charity, make sure you include the amount you'd like to give in your yearly budget.

**Be informed.** Before giving your money, it's best if you know a little about the organization. Find out about the solicitors and their relationship to an organization, ask how your gift will be used and which project your donation will go toward. Give only if you feel comfortable your money supports your cause.

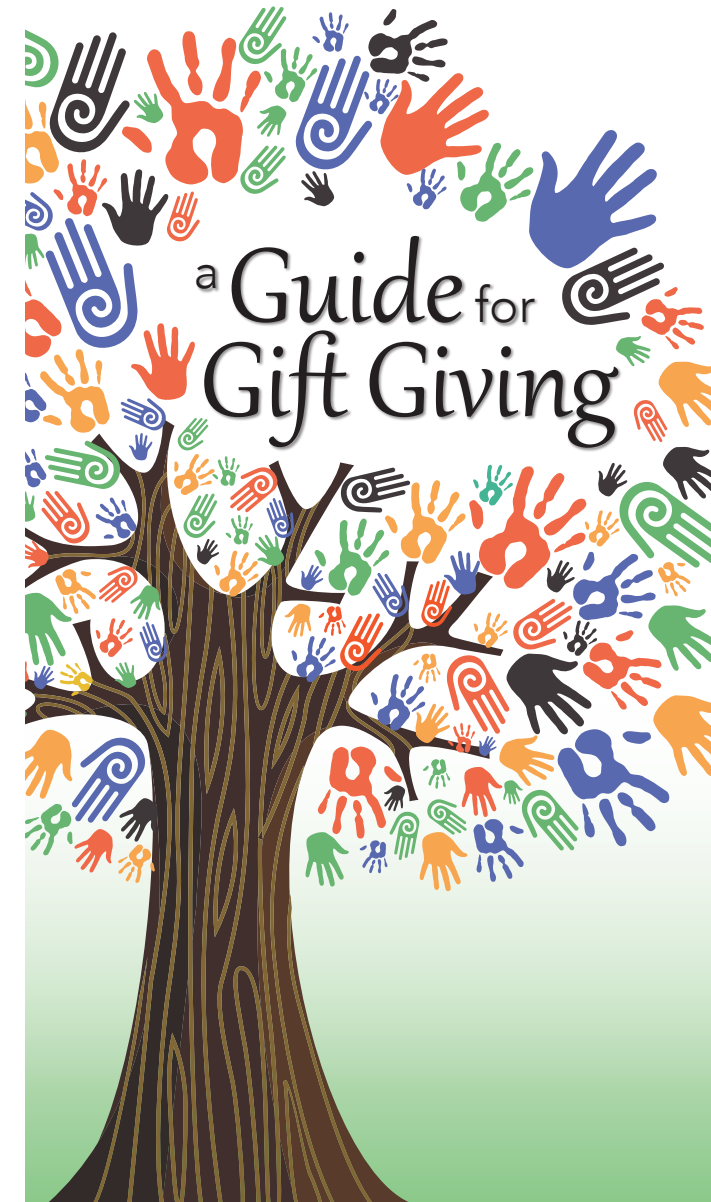
**Keep your records.** A canceled check or credit card statement for gifts less than \$250 are sufficient documentation for IRS purposes. However, for larger donations, be sure you get a receipt that confirms your tax-deductible contribution.

**Know what is tax deductible.** If you receive a premium in exchange for your donation (such as a book or a dinner), your tax deduction is reduced by the fair market value of the premium. You can turn down the incentive if you wish to claim the full amount.

**Make it confidential.** If you prefer that contribution be confidential, let the charity know so your request will be honored.

**Consider alternative forms.** Don't overlook the benefits received from bequests, charitable gift annuities, gifts in kind, endowments and other creative forms of giving (find descriptions on the next page). Ask your tax advisor or attorney to help you make the best plan.

**It's ok to say no.** Give generously when you can, but if you're unsure or feel uncomfortable don't be afraid to say no. You can also ask for more information and take more time to think before making your decision.



205 E Park Ave  
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406.563.8117



The right services to the right people at the right time!

## Get involved

*The work AWARE does is wrapped around both the community and the individual. Since 1976, we have been advocating for, and working with, people facing immense challenges.*

Many of AWARE's programs and services are partially supported through charitable donations. Charitable giving assists us in continuing our mission in serving children, families and adults with autism, mental illness or other developmental disabilities. As you consider your annual giving or estate planning, we hope you will consider giving a gift to AWARE. Your gift is not only tax deductible, it enables us to provide the right services, to the right people, at the right time!

## Contact us

If you have questions or concerns regarding charitable giving at AWARE, including specifics about how we will use your gift, us know:

### Please contact:

Richard Saravalli  
AWARE Development Director  
406.456.6882  
rsaravalli@aware-inc.org

## Thank you for considering us in your charitable giving



### Complete the donor information form and return it to:

AWARE Inc  
Richard Saravalli  
205 E Park Ave  
Anaconda MT 59711

OR

### Donate online at: Aware-Inc.org

### We are a nonprofit company

AWARE, a 501(c)(3), not-for-profit charitable organization is a licensed provider of services in Montana. We are the only organization in the state that has achieved the unique status of being both a licensed mental health center and qualified provider of services for children and adults with developmental disabilities.

\* As with most major financial decisions, we advise that you consult with your attorney and/or financial professional regarding how you choose to give.

### Donor information (please print)

Gift is from: \_\_\_\_\_ Mr. Mrs. Ms. Mrs. & Mrs.

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Memorial information

Gift is to:  Remember (deceased)  Honor (living)

Name: \_\_\_\_\_ Mr. Mrs. Ms. Mrs. & Mrs.

### Who shall we notify of your gift?

Name: \_\_\_\_\_ Mr. Mrs. Ms. Mrs. & Mrs.

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Relationship to remembered/honored? \_\_\_\_\_

### Enclosed is my gift of:

\$50  \$100  \$250  \$500  \$1,000  \$\_\_\_\_\_

### Please use my gift for:

- |  |   |
|--|---|
| <input type="checkbox"/> AWARE (no designated program) | <input type="checkbox"/> AWARE's Early Childhood Programs |
| <input type="checkbox"/> AWARE's Business Network      | <input type="checkbox"/> AWARE's Farm                     |
| <input type="checkbox"/> Arc of Montana                | <input type="checkbox"/> Apostrophe magazine              |
| <input type="checkbox"/> Other                         |   |

### Your preferences:

- |   |   |
|---|---|
| <input type="checkbox"/> Mail the receipt to me.  | <input type="checkbox"/> Do not send a receipt.       |
| <input type="checkbox"/> Email the receipt to me. | <input type="checkbox"/> Add me to your mailing list. |

**Gifts of life insurance, charitable annuities or a bequest** in your will or living trust are wonderful ways to support AWARE and its mission. Talk to us about how planned giving can create lasting benefits for you, your family and the people AWARE serves.

- I would like information about making a gift that produces an income stream, tax advantages, and/or benefits for my family.