

# Types of Planned Gifts

## Bequest in Will

### How it Works:

Name The Boston Home in your will.

### Benefits:

- Control of assets for your future
- Donation exempt from future federal estate tax

## Revocable Living Trust

### How it Works:

Name The Boston Home as the beneficiary of assets.

### Benefits:

- Control of the trust for your life
- Gift in trust exempt from future federal estate tax

## Gift of Life Insurance

### How it Works:

Name The Boston Home as the owner and beneficiary of policy.

### Benefits:

- Immediate income tax deduction
- Possible future deductions through gifts to pay policy premiums

## Gift of Retirement Assets

### How it Works:

Name The Boston Home as the beneficiary of the balance left after your lifetime using the plan's beneficiary form.

### Benefits:

- Giving from the most highly taxed assets leaves more to heirs
- Reduces income and estate taxes

## Gift of Retained Life Real Estate

### How it Works:

Deed ownership of a personal residence or vacation home to The Boston Home while retaining occupancy throughout your life.

### Benefits:

- Income for life and long-term hedge against inflation
- Immediate income tax charitable deduction

The Boston Home is pleased to work with you and your financial advisor to determine the planned giving approach that works best for you.

Please contact Ali Cahill, Director of Philanthropy, to begin the conversation at 617-326-4261 or [acahill@thebostonhome.org](mailto:acahill@thebostonhome.org).