

| GIFT TYPE | HOW DOES IT WORK? | BENEFIT TO YOU |
|------------------------------------|---|--|
| Bequests | <p>Name Taproot Theatre as a beneficiary in your will or living trust.</p> <p>Include one or two sentences in your will or living trust that leaves to Taproot Theatre a specific item, an amount of money, a gift contingent upon certain events, or a percentage of your estate.</p> | <p>Your gift costs nothing in your lifetime. The donation is exempt from federal estate tax.</p> |
| Beneficiary Designations | <p>Name Taproot Theatre as a beneficiary to receive assets, such as retirement plans and life insurance policies after you're gone.</p> <p>It's easy and flexible: Fill out a form that is entirely separate from your will and review/adjust beneficiary designations at any time.</p> | <p>The donation is exempt from federal estate tax.</p> |
| Charitable Gift Annuity | <p>Gifts annuities serve as contracts between Taproot Theatre and you, the donor. We agree to pay a fixed sum of money to you for the duration of your life. Afterwards, the remainder is left to Taproot Theatre.</p> | <p>Your gift supports Taproot while also guaranteeing you a stream of income for the rest of your or a loved one's life</p> <p>Gift annuities allow an immediate charitable tax deduction.</p> |
| Charitable Lead Trust | <p>Arrange a charitable lead trust that makes payments to Taproot Theatre for a specified period of time, which you choose. When the term is up, the remaining trust assets go to you, your family, or other beneficiaries you select.</p> | <p>Significantly reduce gift and estate taxes for your children or grandchildren.</p> |
| Charitable Remainder Trusts | <p>Set up a charitable remainder trust that provides you or other named individuals income each year for life or a specified period (not exceeding 20 years). An irrevocable remainder interest is then paid to Taproot Theatre.</p> | <p>These trusts allow for an immediate income tax deduction for a portion of the assets and up-front capital gains tax avoidance.</p> |
| Real Estate | <p>There are several ways to make a gift of real estate – including an outright gift, a bequest, a retained life estate, or a bargain sale (to name a few) – each with differing benefits based on your goals.</p> | <p>When you donate appreciated property you have held longer than one year, you get a federal income tax charitable deduction and avoid paying capital gains taxes.</p> |
| Memorial/ Tribute Gifts | <p>Give a memorial or tribute gift in honor of a loved one (or yourself) and inspire philanthropy in others</p> <p>Any charitable gift you arrange can be made in honor of someone, whether given today or through your will or living trust.</p> | <p>You can honor a friend or loved one and receive financial benefits from your contribution.</p> |
| Donor Advised Funds | <p>Avoid the complexities of managing a private foundation by setting up a donor advised fund. Transfer cash or other assets to that fund, operated by a tax-exempt sponsoring organization (e.g. Seattle Foundation), and then recommend—but not direct—how much and how often money is granted to Taproot Theatre.</p> | <p>Donor advised funds allow you to centralize and simplify your charitable giving, as well as take an immediate tax deduction without having to choose charity benefactors right away.</p> |