

Giving options compared

Outlined below are giving options with financial and estate planning goals they can help you to achieve. Any option that benefits Unbound helps provide resources to support our efforts to break the bonds of poverty through our programs worldwide.

Feel free to contact us regarding your gift planning goals. We are happy to discuss how these giving options can help facilitate personal goals you might share for Unbound and your sponsored friend.

Bequest in a will or trust

Planning goal:	A deferred gift after death to provide funding for Unbound and/or continuation of benefits for your sponsored friend. Your gift to Unbound may include assets you longer need with a possible reduction in estate taxes.
Action plan:	Contact your legal adviser. Offer sample bequest language for a provision in your will or trust to include both Unbound and/or funding for your sponsored friend. After you have contacted your legal adviser, please notify us.
Beneficiary designation:	Unbound

Life insurance

Planning goal:	A deferred gift after death to provide funding for Unbound and/or the continuation of benefits for your sponsored friend. Life insurance can be purchased at a reduced while leaving more traditional estate assets to your heirs.
Action plan:	Contact insurance carrier with beneficiary instructions. Please notify us once you have completed the required forms.
Beneficiary designation:	Unbound

This document provides general information about gift planning and is not intended to provide individual financial, legal or tax information or advice. Unbound recommends that you speak with a tax adviser, financial adviser or attorney about how to make charitable giving part of your overall financial plan.



Retirement assets

Planning goal:	A deferred gift after death to provide funding for Unbound and/or the continuation of benefits for your sponsored friend. Avoid income tax liabilities on pre-tax and tax-deferred assets while leaving more traditional estate assets to your heirs.
Action plan:	Contact the plan administrator with beneficiary instructions. Please notify us once you have completed the required forms.

Appreciated stocks, mutual fund shares

Planning goal:	Non-cash immediate funding to Unbound. Receive a current year charitable deduction and avoid income tax on the appreciated value.
Action plan:	Action plan: Contact your broker with transfer instructions. Authorize a direct transfer of appreciated securities that have been held for more than one year. Please notify us once you have authorized the direct transfer to Unbound.

Charitable gift annuity

Planning goal:	A more substantial current gift to Unbound with lifetime income options for you and another family member. Receive current year charitable gift deduction and income payments for life or a specified period that are partially tax free.
Action plan:	Contact us and enter into a simple contract with Unbound. Complete required forms and transfer funding assets.

Charitable remainder trust

Planning goal:	Payments to you and other family members for life or a specified period with Unbound designated to receive the unused portion of assets. Receive current year charitable deduction for trust assets and income payments for life or a specified period.
Action plan:	Consult your legal adviser and financial institution to establish a charitable trust that pays you annual income. Complete required documents, and please notify us once the trust agreement is in place.