

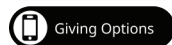


## The impact of your gift

Your generosity drives our mission. With every Smart Gift, you're helping to close gaps and open opportunities so that all can thrive. You are creating pathways for families and individuals to achieve stability, success, and fulfillment from the earliest stages of life through adulthood.

Join our community of strategic givers today and champion a local impact that lasts.

To learn more about smart giving options scan the QR code



Learn more about Smart Giving options and how they can benefit you on our website by scanning the QR code below. You can also reach out to our Resource Development team. We're here to help you navigate these giving methods and answer any questions you may have.



Explore Non-Cash Options

### Have more questions?

Please contact a member of our Resource Development team at 765-288-5586

### Follow us



[www.heartofindiana.org](http://www.heartofindiana.org)



*Please consult with your tax advisor or financial professional before making a decision about Smart Giving. Your philanthropy is deeply personal and unique, and we want to ensure you are fully informed about your giving options.*

SMARTER WAYS TO GIVE

## Please keep this guide for future reference



Heart of Indiana  
United Way

Discover the power of Smart Giving with Heart of Indiana United Way



Make a bigger impact with less cost to you

YOUR GUIDE TO

# Smart Giving

This guide is designed to help you make the most of your giving, to any cause you care about. Each giving type brings unique tax benefits, allowing you to donate in a way that also maximizes your financial strategy.



Please hold on to this document to reference for future giving



## Donor-Advised Funds

A Donor-Advised Fund (DAF) is like your own charitable savings account. You contribute to the fund as frequently as you like and then recommend grants to nonprofits like ours, all while potentially earning immediate tax benefits.

To give from your DAF:

Go to [www.freewill.com/smartgiving/heartofindianaunitedway](http://www.freewill.com/smartgiving/heartofindianaunitedway) and select the Donor-advised Fund (DAF) tab



## Qualified Charitable Distributions

A Qualified Charitable Distribution (QCD) is a direct transfer of funds from your IRA to a nonprofit, counted towards your required minimum distributions for the year, without treating the distribution as taxable income.

To make a QCD:

Go to [www.freewill.com/smartgiving/heartofindianaunitedway](http://www.freewill.com/smartgiving/heartofindianaunitedway) and select Individual Retirement Account (IRA) tab



## Cryptocurrency Gifts

Cryptocurrency donations are a new, tax-efficient way to give. By donating cryptocurrency, you potentially avoid capital gains tax on the appreciation and can deduct the fair market value of the asset on your tax return.

To donate cryptocurrency:

Go to [www.heartofindianaunitedway.org/ways-to-give/](http://www.heartofindianaunitedway.org/ways-to-give/) and select Crypto



## Stock Gifts

Donating appreciated stocks can provide substantial support to our cause and potentially help you avoid capital gains taxes and claim a tax deduction based on the full market value of your stocks.

To donate stocks:

Go to [www.freewill.com/smartgiving/heartofindianaunitedway](http://www.freewill.com/smartgiving/heartofindianaunitedway) and select Stocks and other securities tab



## Legacy Giving

One of the most powerful ways to support Heart of Indiana United Way is by including a legacy gift in your will or Revocable Living Trust. You can also make a planned gift by making our organization a beneficiary on your life insurance, 401K or IRA.

It is a gift that costs you nothing today and into the future, ensures we can continue to help families and children thrive for generations to come.

To begin your legacy today, Heart of Indiana United Way offers FreeWill, a FREE online tool that guides you through the process of creating a will in just 20 minutes.



Make a Will

Heart of Indiana  
United Way

