



OPTIONS FOR GIVING NON-CASH ASSETS

Cash gifts are popular options for donating, but these offer limited tax benefits and can impact your discretionary spending—you might want to consider donating non-cash assets to make a greater impact. At the Arizona Community Foundation, we work with you and your advisors to ensure you can maximize your tax planning while making more of those assets available for future grantmaking. See the back of this sheet for a full list of non-cash assets that can be gifted and which ACF fund types can accept those types of assets.

Our approach

- 1. Define your charitable goals.** Our team of expert philanthropic advisors will work with you to make sure your donation can create the impact you want in the community. Your dedicated relationship manager will lead you through a comprehensive process to understand your charitable goals and build a giving plan that aligns with your values.
- 2. Determine the timing, amount, and type of assets to contribute.** Certain assets offer greater financial advantages when donated during one's lifetime, while others hold more value posthumously. We take your unique financial situation into account and partner with you and your advisor to determine whether an asset can be donated today, or a portion of it, or would be better suited as a legacy gift to be sold upon your passing.
- 3. Select a fund type that aligns with your objectives.** Once we understand your charitable goals and funding strategy, we recommend a giving vehicle that fulfills those requirements. More information about our fund types is available at azfoundation.org/fundtypes.
- 4. Information about your asset is confidentially reviewed by our Gift Acceptance Committee.** We gather pertinent data about your non-cash asset to make sure the gift poses no financial or legal difficulties, and to ensure there is a market for the asset. This information is provided to our Gift Acceptance Committee for approval before we move forward with ownership transfer.
- 5. Transfer ownership of the asset and begin the liquidation process.** Once approved, we take ownership of the asset or portion of the asset that was gifted. Ability to liquidate the asset within a reasonable period of time is a consideration of acceptance so that your charitable dollars can go further, faster.



GIVING GUIDE

ASSET	GIFT METHOD	Beneficiary Designation	Bequest by Will/Trust	Charitable Remainder Trust	Donor Advised Fund	Gift Annuity	Retained Life Estate
	Cash	X	X	X	X	X	
	Artwork/Collectibles		X	X	***		
	IRA	X					
	Life Insurance	X			X		
	Real Estate	***	X	X	X		X
	Business Interest		X	X	X		
	Stock (Private)		X	***	X		
	Stock (Public)	X	X	X	X	X	
	Virtual Currency		X	X	X	***	

*** Possibly, depending on circumstances.

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