



By making a planned gift to DVNF through your will or estate, you forge a covenant with the veterans who have fought for our freedoms. Your generous gift will support the DVNF mission and your dedication will be remembered beyond your own lifetime.

**THIS CAN BE
YOUR LEGACY.**



Disabled
Veterans
National
Foundation

P.O. Box 96648
Washington, D.C.
20090-6648



Disabled
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National
Foundation

**MAKE A
LASTING
IMPACT:
CREATE YOUR
LEGACY**



This pamphlet is intended for educational purposes only. Please consult with your professional advisors on how a gift would fit into your overall plans. The above and foregoing is not intended to be legal advice and individuals are urged to seek competent legal help as an important partner in the estate planning process.

PLANNED GIVING

A PLANNED GIFT

YOUR GIFT	YOUR GOAL	HOW TO MAKE THE GIFT	YOUR BENEFITS	BENEFITS TO DVNF
GIFTS NOW				
Appreciated Securities	Eliminate tax on capital gains	contribute long-term appreciated stock or other securities	<ul style="list-style-type: none"> • Immediate charitable deduction of full fair market value • Elimination of capital gains tax 	Funds are available for immediate use for DVNF programs
Charitable IRA Rollover	Eliminate the twofold tax on IRAs or other qualified retirement plans.	Name DVNF as beneficiary of balance remaining after your lifetime, using plan's beneficiary form	<ul style="list-style-type: none"> • Make gift from the highest taxed assets, leaving more for family • Eliminate income and estate taxes 	Funds are available for immediate use for DVNF programs
Real Estate	Deductible for income tax	Real estate can be gifted now or later through a trust or will.	<ul style="list-style-type: none"> • Make gift from the highest taxed assets, leaving more for family • Eliminate income and estate taxes 	It is difficult for an organization to receive real estate. The better option would be to sell the property and donate the proceeds of the sale.
GIFTS THAT PAY INCOME				
Charitable Gift Annuity	Fixed income for lifetime	You transfer cash or securities to DVNF in return for our promise to pay you a fixed income for the rest of your life.	<ul style="list-style-type: none"> • Tax deduction in early years of gift • No capital gains on appreciated gift 	<ul style="list-style-type: none"> • Portion of funds can be available for use by the foundation • Ensures future funding for foundation programs • Upon death of the insured, remaining principal payable to the foundation.
Charitable Lead Trusts	Reduce Gift and Estate Taxes on assets you pass to children or grandchildren	Create a charitable trust that pays fixed or variable income to DVNF for a specific term of years; thereafter the balance is given to loved ones.	<ul style="list-style-type: none"> • Reduces your taxable estate • Property given back to your family, often with reduced gift taxes. 	Provides DVNF with current income for the length of the trust for a period of at least ten years.
Charitable Remainder Trusts	Create a hedge against inflation over the long term and supplement your retirement income.	Create a trust that pays a fixed percentage of trust's assets as r evaluated annually.	<ul style="list-style-type: none"> • Variable income for life • Immediate income tax charitable deduction 	Ensures substantial future funding for DVNF
GIFTS LATER				
Bequests (restricted or unrestricted)	Defer a gift until after your lifetime	Name DVNF in your will or revocable living trust (designate a specific amount, a percentage or a share of the residue.)	<ul style="list-style-type: none"> • Gift exempt from federal estate tax • Control of asset for your lifetime 	Ensures future funding for DVNF
Bank or Investment account	Defer a gift until after your lifetime	Name DVNF as beneficiary to your Bank or Investment accounts	Control of your asset for your lifetime	Ensures future funding for DVNF