END THE YEAR WELL
Get a head start on your year-end tax planning

Village Theatre
Mainstage + New Works + Youth Education

TAX-WISE CHARITABLE PLANNING STRATEGIES

Here are some ways you can shift tax dollars to charitable dollars, and support a cause like ours.

**IRA Charitable Rollover**
Congress made permanent the law that allows people age 70½ or older who own an IRA to make cash gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution. Contact us to learn more.

**Outright Gift of an Asset**
If you wish to make a gift to support our cause this year, but are concerned about preserving your cash resources, consider a gift of an appreciated asset. A gift of securities, business interests, or real estate can provide you with significant income and capital gains tax savings, often exceeding the benefits of a cash gift.

**Donor Advised Fund (DAF)**
If you are looking for an end-of-year deduction, but want more time to make thoughtful giving decisions, consider a donor advised fund (DAF). Our organization can use your tax deductible gift to establish a DAF in your name. You can make grants from your DAF now and in the future to support our work and other causes you care about.

**Zero-Tax Gift and Sale**
If you are planning to sell an asset like securities, real estate, or a business, before you sell, consider a "zero-tax" charitable gift and sale. By making a gift of part of the asset before the sale, you can use a tax-saving charitable deduction to significantly lower or eliminate the capital gains tax on the sale.

Consider these worthwhile strategies before the year’s end.*

- **Selling securities, real estate, or a business this year?** Consider planning strategies to avoid capital gains tax.
- **Considering planning strategies to avoid capital gains tax at age 70½ or older?** Make a gift from your IRA.
- **Own an IRA and/or401(k)?** Maximize your deductible contributions.
- **Expect to be in a higher tax bracket?** Talk to your tax advisor for solutions to manage taxes.
- **Expect to be in a lower tax bracket or can control income?** Shift income to this year.
- **Have investment losers?** Sell to offset winners and lower your capital gains tax.
- **Extra medical expenses?** Establish a health savings account (HSA).
- **Have state taxes, property taxes, medical bills?** Accelerate deductible expenses.

*Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

**CONTACT INFORMATION**

Please contact me for more information on end-of-year giving strategies.

I have already included your organization in my will or trust.

Please contact me with more information about planned gifts and estate planning strategies.

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How can we help?

The best way to contact me is by:

- Telephone
- Email
- In person

Attn: Stefanie Fatooh

MAIL FORM TO:

Stefanie Fatooh (425) 392-1942 x206
LegacyGiving@VillageTheatre.org

**VILLAGE THEATRE GALA GUESTS, PHOTO: eQUALITY IMAGES**

SHE LOVES ME, ALLISON STANDLEY, PHOTO: TRACY MARTIN
TESTIMONIAL

Years ago we set up an IRA that would provide for us in our later years. Now that we’ve reached our 70’s, we are required to take a minimum distribution from our IRA, called a Required Minimum Distribution (RMD). Withdrawals from a traditional IRA like ours are always taxed as ordinary income, so we were happy to learn of a tax-efficient way to make donations to our favorite charities using our IRA by doing what’s called a Qualified Charitable Distribution. Under this IRS provision, gifts made from an IRA to a qualified charity count towards satisfying your RMD, and the donation is also excluded from your taxable income. We thought it was a great way to leverage our charitable contributions to Village Theatre and have been really happy with it!

—Fred and Mary VanEss

SUPPORT THE PROGRAMS YOU LOVE

If you would like further information on these end-of-year planning strategies, please contact us. We can help you create a plan that meets your needs and goals.

CALL:
Danielle Franich (425) 392-1942 x116

EMAIL:
LegacyGiving@VillageTheatre.org

LEARN MORE AT:
VillageTheatreLegacy.org