

Tax Reform Is Here Top Giving Strategies for 2018

Dear friend,

Tax reform is here. As with any economic change, you may be looking at your finances and wondering how you will be impacted. There are many ways you can make a difference for [insert mission] while enjoying financial benefits for yourself.

Here are some smart ways to be charitable in 2018:

- **Donate appreciated stock:** With the stock market at or near all-time highs, give your appreciated stocks to a nonprofit like [insert Org Name] and eliminate capital gains tax.
- **Name us as a beneficiary of retirement plan assets:** These assets remain taxable when distributed to a loved one but tax-free when given to a nonprofit.
- **Give from your IRA (if you are 70½ or older):** Regardless of whether you itemize your taxes, this gift helps you fulfill your required minimum distribution and is not considered taxable income.

We are so grateful for your generosity. Please contact me at [insert email address] or [insert phone number] to discuss how your gift can help further our mission.

Sincerely,

[signature]

[name]

[title]

[organization name]

[phone/email]