Giving Non-Cash Assets

When people think about giving to charity, they often think first of writing a check. But nearly 90 percent of wealth is held in non-cash assets. Real estate, retirement accounts, investments and other assets can offer meaningful opportunities to support the causes you care about—often with valuable tax benefits.

Here Are a Few Examples of Non-Cash Assets

- Charitable gifts from a will or trust
- Individual Retirement Accounts (IRAs)
- Real estate
- Business interests
- Life insurance
- Appreciated assets like stocks, bonds and mutual funds
- Farm commodities
- Personal property
- Oil, gas and mineral rights

Giving non-cash assets may offer significant tax advantages while allowing you to make a greater charitable impact. In some cases, transferring an appreciated asset to charity before it is sold can help reduce or eliminate capital gains tax while also providing a charitable deduction.

By looking beyond cash, you may discover a meaningful way to make the most of what you have and create an impact that lasts for generations.

This information is not intended as tax or legal advice. Please consult your professional advisor regarding your individual circumstances.

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