



Leave a Lasting Legacy by Making a Planned Gift With thoughtful tax planning, a gift to Montgomery Hospice can also help you to achieve your financial goals. Using the correct giving instrument, you can make a gift and receive guaranteed income for life for you and your loved ones. Contact your tax or financial advisor for detailed information.

Charitable Bequest You may choose to name Montgomery Hospice as a beneficiary in your will or estate. Such a gift might include a percentage of your estate, a specific dollar amount or personal property such as real estate. When including Montgomery Hospice as a beneficiary in your will or estate, please identify our organization as:

Montgomery Hospice, Inc. 1355 Piccard Drive, Suite 100, Rockville, MD 20850

Real Estate Donations of property that have been paid in full can offer substantial tax advantages. Contributors have the ability to deduct the fair market value of the property, avoid capital gains taxes and also remove the property as an asset from a taxable estate.

IRA Donations Retirement plan assets can serve as a practical resource for making a gift. Unlike other types of investments, amounts withdrawn from an IRA are taxable to you – and eventually to your potential heirs. If you are 70 1/2 or older and have an IRA, you may want to consider making a charitable gift directly from these funds. Cash allocations withdrawn for charitable purposes are not taxed as income to you and represent a way to make a completely tax-free gift.

Life Insurance If you own a life insurance policy that no longer responds to your current circumstances and that has an accumulated cash value, you might consider donating it for use as a charitable gift. In doing so, you will receive income tax savings today and also significant estate tax savings in the future.

For more information on any of these planned giving methods, contact your tax advisor or estate lawyer. Montgomery Hospice is privileged to work with a counsel of experts including certified financial planners, tax and estate attorneys, accountants and investment advisors who are available to offer assistance or answer questions, free of charge.

Call the Montgomery Hospice Philanthropy Office at 301-921-4400 for more information.