



PLAN AHEAD

	Your Gift	Your Goal	How You Make the Gift	Your Benefits
Simple Gifts Anyone Can Make	Your Will or Trust A Beneficiary Designation	<ul style="list-style-type: none"> Defer a gift until after your passing. Maintain control of your assets during your lifetime. 	<ul style="list-style-type: none"> Work with your attorney to add a gift in your will or living trust detailing your donation to Mayo Clinic. Designate Mayo Clinic as beneficiary of a percentage of your retirement plan, savings or brokerage account, or life insurance policy. 	<ul style="list-style-type: none"> Maintain your current lifestyle while making a meaningful gift to support Mayo Clinic. Enjoy flexibility to change your plans as life changes. Pass your retirement plan assets to us tax-free.
Gifts of Assets	Stock or Other Securities Real Estate	<ul style="list-style-type: none"> Make a gift now and receive benefits. Make a larger gift with little or no effect on cash flow. 	<ul style="list-style-type: none"> Give stock or securities that have increased in value directly to us. Donate your residence, farm or commercial property. 	<ul style="list-style-type: none"> Qualify for a potential income tax deduction. Avoid capital gains taxes on assets that have increased in value. Transfer the expense of insuring or maintaining assets you no longer need.
A Gift That Pays You	Charitable Gift Annuity*	<ul style="list-style-type: none"> Supplement your retirement income with steady payments. Receive payments that are partially income tax-free. 	<ul style="list-style-type: none"> Make a donation of cash or securities to benefit Mayo Clinic through a simple exchange for fixed payments for life. 	<ul style="list-style-type: none"> Qualify for a potential income tax deduction. Enjoy tax savings on a portion of each payment you receive throughout your life expectancy. Receive fixed payments for life. What is left of your gift after your passing supports us.
A Flexible Gift That Pays Income	Charitable Remainder Unitrust Charitable Remainder Annuity Trust	<ul style="list-style-type: none"> Supplement your own retirement income or that of someone else with a charitable remainder trust. 	<ul style="list-style-type: none"> You transfer cash, securities or other appreciated property into a charitable remainder trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to you, or another beneficiary if you choose, for a lifetime or a term up to 20 years. When the term is up, the balance goes to Mayo Clinic. 	<ul style="list-style-type: none"> With a charitable remainder trust, you can make a generous gift to Mayo Clinic, qualify for a potential income tax deduction for the charitable portion of your gift and eliminate capital gains tax at the time of the gift when the trust is funded with appreciated assets.
Gifts That Reduce Gift and Estate Taxes on Assets You Pass to Family	Charitable Lead Unitrust Charitable Lead Annuity Trust	<ul style="list-style-type: none"> Provide a revenue stream to Mayo Clinic with a charitable lead trust. 	<ul style="list-style-type: none"> You transfer securities or other appreciating property into a charitable lead trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to Mayo Clinic for a lifetime or term of years. The balance then passes to your heirs. 	<ul style="list-style-type: none"> Support Mayo Clinic during your lifetime, keep property in the family and often reduce gift taxes with the charitable lead trust.

*Charitable gift annuities are not available in all states or through all organizations. Please contact us if you are interested in a gift annuity.