



Episcopal Charities
OF SOUTHEAST FLORIDA
Funding parish ministries . . . Transforming lives

SHARING ABUNDANCE

Charitable Ideas & Information from Episcopal Charities of Southeast Florida

FALL 2008

All Ready for School

What a Turnout!

More than 340 schoolchildren showed up at St. Luke's Episcopal Church in Port Salerno on Saturday, July 19, for the fourth annual Back to School Fair.

The St. Luke's Outreach Committee supplied needy schoolchildren with backpacks stuffed with school supplies. Plus, the first 200 children received vouchers to order a school uniform! This represented a 100 percent increase in attendees from last year's event.

In addition to backpacks, school supplies and school uniforms, there were educational stations for eye safety and free tutoring. For the second year, Canine Companions for Independence, a nonprofit organization of assistance dogs,

had a service dog on-site to demonstrate how the lives of people with disabilities can be enhanced. And of course, as in past years, the Martin County Fire Department arrived in full uniform in their fire truck.

Everyone was treated to refreshments and baked goods.

The school uniforms this year were a highlighted feature, which were obtained through a grant from **Episcopal Charities of Southeast Florida**. In addition to St. Luke's parishioners' donations of supplies and time, St. Luke's Bingo Program,



Walgreens and Publix have contributed to the Back to School Fair for the past four years.

"We are pleased to be part of such a successful community program," says Charlie Ring, president of Episcopal Charities of Southeast Florida.

Start Receiving Benefits *Today*

When you make a donation to us now, we both benefit. Your generosity enables us to meet our pressing needs and you receive immediate tax benefits. If you would like to defer your giving to a later time, however, contact us about making a future planned gift—a way for you to make a gift without using any of the money in your pockets today. To learn about the rewards of a gift you make today, continue reading!

Get Something in Return

The federal income tax deduction encourages the support of nonprofit institutions like ours by reducing the out-of-pocket cost of your generosity.


Each year you can deduct up to 50 percent of your adjusted gross income for cash gifts and 30 percent for gifts of capital gain property you've owned for more than a year. If your gift exceeds the ceiling, the excess deduction can be carried

over and deducted for up to five additional years.

You get two tax benefits from a gift of appreciated stocks or real estate you have held for longer than one year:

1. Complete avoidance of capital gains tax on the property's appreciation
2. A deduction for its current market value (instead of what you paid for it plus any improvements)

Call Us



A gift you make today promises many benefits. Ask our representative to explain how your gift can be satisfying and cost-effective.

Choose the Best Kind of Gift for You

When you consider making a donation today, be sure to determine the form of gift that makes the most sense for you.

Cash gift by check. With a cash gift, you receive an income tax deduction and give us immediate financial support. This is the most common and simplest method of making a contribution—though not always the most cost-effective.

Gift of a marketable security.

This is the second most popular outright donation. If you have

held the security for more than one year and it has increased in value, you get a deduction for its current fair market value and avoid capital gains tax on the appreciation.

Suppose you like the particular security and want to hold it for further growth in value, but you also want to make a gift to us. Go ahead and donate the stock instead of cash, and then buy an equal number of new shares of the same holding. The replacement shares will have a new, higher cost basis, eliminating any future

capital gains tax on your prior appreciation when you eventually sell the stock.

Additional gift options. Other kinds of assets may also make desirable gifts. Seek professional counsel to ensure that you make the most of the gift for you and us.

- **Life insurance.** Consider donating a policy with cash surrender value that you no longer require for its original purpose.
- **Real estate.** An outright gift can produce substantial tax

Q&A: Documenting Your Contributions

Q. How do I document my gifts to ensure that I receive the tax benefits owed to me?

A. For cash contributions of any amount, be sure to get a written acknowledgement of your contribution from the charitable organization. It must include the amount of cash contributed, whether you received any goods or services in exchange for the gift, and a description and good faith estimate of the value of any goods or services received.

For gifts by check of less than \$250, a copy of the check is

sufficient documentation. For a gift of \$250 or more, you should obtain a receipt.

For noncash contributions, the records you keep depend on whether your deduction is:

- less than \$250
- \$250–\$500
- \$501–\$5,000
- more than \$5,000

Requirements vary, but in general you must obtain a receipt from the organization indicating a description of the property. You must keep

records of the date, location and description of the contribution; its value; and the amount you claimed for a deduction.

Don't miss out on the benefits you rightly deserve because you didn't properly document your gift. If you have questions about how to document your contribution to our organization, please feel free to contact us.



savings and relieve you of the hassle of selling.

- **Bargain sale.** Arrange a sale of property to our organization at a price below its fair market value, thereby securing a deduction for the gift portion and reducing the potential capital gains tax.
- **Closely held stock.** If you are a major stockholder, a donation of nonmarketable stock can allow you to be generous at a low net personal cost.

Learn How You Can Make a Difference Now!

Maybe you want to help others, but you just don't know where to start. Our FREE guide can help. *6 Easy Ways to Support What You Love Today* offers in-depth information on numerous ways to make an immediate impact. Return the enclosed reply card for your copy.

6 Easy Ways
To Support What
You Love Today

FREE GIFT!

Thank You to Our 2007–08 Donors

Episcopal Charities is a catalyst that encourages the creation of a community of generosity, providing assistance to and information about programs that inspire the best of our human instincts to care, be compassionate and share.

We are honored and grateful to be in partnership with so many good and faithful people.

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Bonnie Weaver – Holy Trinity, WPB

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