

Hope Legacy Foundation

A Public 501(c)(3) Charity

What if you could...


- Sell highly appreciated assets and avoid capital gains tax
- Create substantial income tax deductions
- Create a lifetime income stream for you and/or your posterity
- Leave a legacy to charities of your choice

Would you do it?

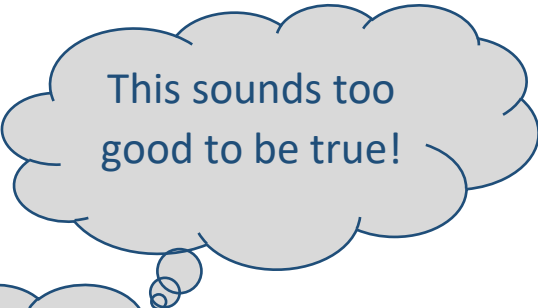
You're probably thinking...



What's the catch?



How can this be done?



This sounds too good to be true!

What Is It?

A Pooled Income Fund

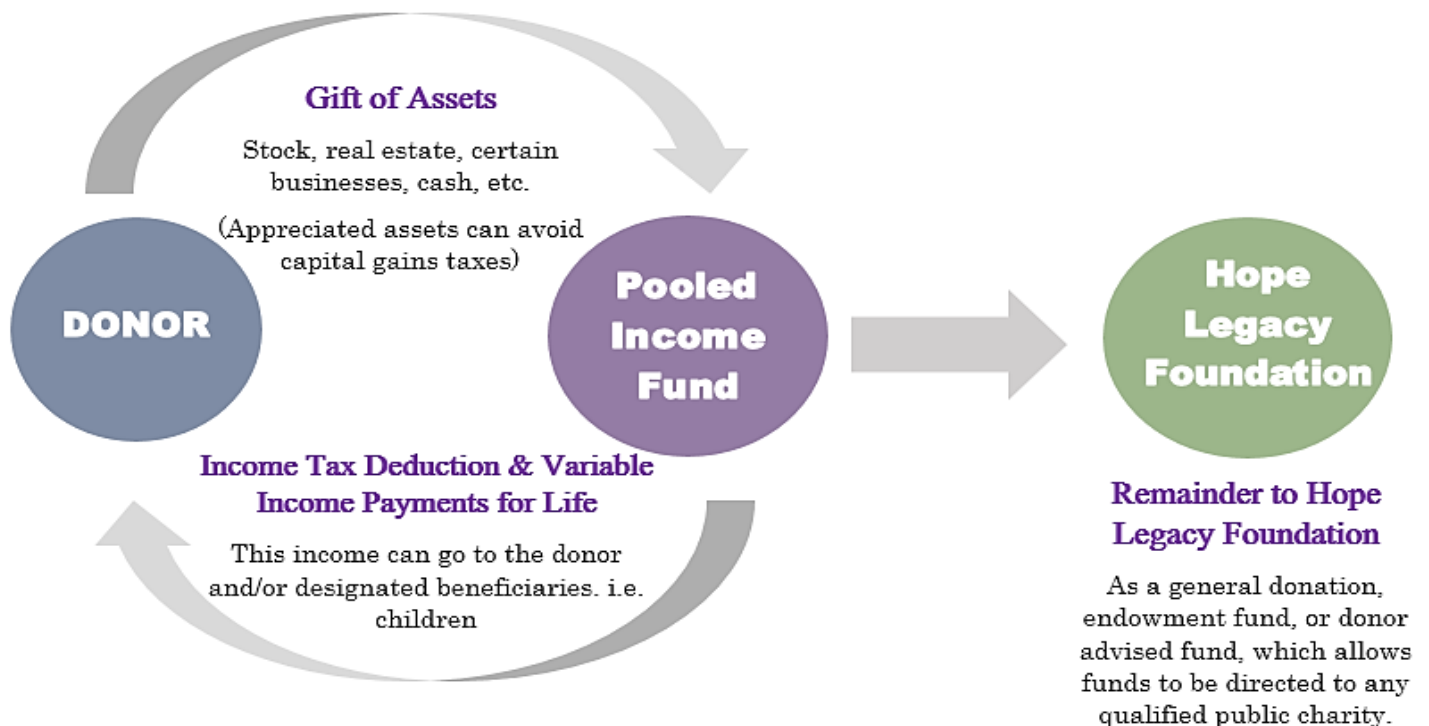
This tax-exempt trust has been sitting in the IRS Code [1.642 (c)-6] since 1969. Have your CPA look it up!

Due to low interest rates, tax deductions are high.

A 'PIF' acts like a mutual fund, in that individuals "pool" assets into the trust and receive deductions and a substantial income stream in return. Assets gifted into the trust are irrevocable and ultimately go to the charity(ies) of your choice.

How It Works!

The trust must be sponsored by a Public 501(c)3 charity.
Hope Legacy Foundation is a public charity!



Methodology

We employ an expert investment manager to actively watch over and manage our pooled income funds (PIFs)

Hope Legacy Foundation sponsors three PIFs

Income Fund	Opportunities Fund	Advantage Fund
Designed for maximum current income, with a secondary objective of growth which can lead to greater future income	Designed for growth and appreciation, followed by income in the future, can include stocks, bonds, options and real estate based on prudence and market conditions	Designed for income and growth, this PIF can accept all types of assets, including real estate. and can invest in real estate as well as other investment alternatives

About The Sponsoring Charity

Hope Legacy Foundation, a 501(c)3 public charity provides educational and financial resources to those in need through mentorships and workshops in the areas of finance, life skills, self-reliance, education, career advancement, & talent development.

We focus on helping young adults, young military veterans, and others to become thriving members of society and future leaders.

*“If you give a man a fish, he eats for a day.
If you teach a man to fish, he eats for a lifetime.”*

Examples From Real People

Scenario 1:

Joan and John, both 57, had appreciated stocks they wanted to diversify for safety and to generate income from. However, they didn't want to sell the stocks because it would be too costly in taxes.

After examining all of their options, they decided to utilize the trust and donated **\$100,000** worth of appreciate stock value into the Pooled Income Fund. Their original cost basis was **\$20,000**.

Through their donation, they received a deduction of 66% (\$66,400) against income, an avoidance of \$80,000 of capital gains, a total tax savings of \$55,114, and a lifetime income of \$6,000/ year.

Now, Joan and John are enjoying the benefits of extra income, a much-needed tax break, and they feel good knowing that the funds will eventually benefit causes close to their heart.

Scenario 2:

Jenny, age 67, had an income property worth **\$500,000** that served her very well over the years. She was looking forward to retirement but managing a rental property didn't fit into her plan. She had the property for many years and her original basis was **\$100,000**. She was looking at a large tax bill if she sold it outright.

Jenny counseled with the important people in her life and ultimately decided using the PIF was the right solution for her. Since her children would no longer inherit the property, they will now inherit a lifetime income, which over their life expectancy could total over \$1,800,000.

Through her donation, Jenny received a deduction of 53.4% (\$266,940) against income, an avoidance of \$400,000 of capital gains, a total tax savings of \$237,895, and a lifetime income of \$30,000/ year.

Now Jenny can fully enjoy her retirement with extra income and none of the stress that comes from managing a rental property. She is able to bless the lives of her children and still give to causes she is passionate about in the future.

names changed for privacy

Contact **Hope Legacy Foundation** to learn more about
Pooled Income Funds and other charitable strategies!

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