

You can turn your generosity into tax savings by making charitable contributions to organizations with a tax exempt 501c3 designation. No need to wait until the end of the year to consider a charitable gift, plan TODAY!

Vehicles for Charitable Giving

- Outright Cash
- Gift of Appreciated Securities
- Gift of Personal Property
- RMD directed to charitable organizations – restrictions apply
- Planned Giving
 - Bequests
 - Charitable Trusts
 - IRA Beneficiary
 - Life Insurance



Document Your Donation

- Keep bank statements, credit card receipts, copies of checks
- Contributions over \$250, gift acknowledgements are necessary
- IRS rules apply for personal property valued over \$5,000

Consult Your Financial Professional

- Discuss tax ramifications and timing with your accountant
- Review with your investment manager the effect your gift will have on your overall portfolio and cash flow
- Coordinate charitable gifting with your estate planning goals

THE BOTTOM LINE



Building your foundation
for financial success.

Twinbridge helps clients achieve their financial goals through a network of carefully screened managers who are experts in their fields and have dedicated research analysts to support portfolio decisions. Generally there is no fee for the initial consultation and the on-going client services:

- Evaluating your financial long-term and short-term goals,
- Helping you through the process of selecting your financial manager,
- Transitioning accounts and determining a Portfolio Review schedule,
- Reviewing your monthly statements and tracking performance,
- Attending all Portfolio Review meetings with you and your advisor,
- Partnering with you in all areas of your financial landscape.

The information contained herein has been obtained by sources believed to be reliable but is not necessarily complete and is not guaranteed. This is prepared for general informational purposes only and does not have regard to the specific investment objectives, financial situation or particular needs of any person who may receive it. Views are subject to change without notice. Twinbridge Disclosure Statement is available upon request.