

A Field Guide to Planned Giving

When a donor makes a planned gift to the American Technion Society, they join the ATS family and establish a living legacy at the Technion, a world-renowned research institution which has provided opportunity to Israel's brightest young students for 100 years. With a planned gift, donors are planting the seeds for the next 100 years of innovation, entrepreneurship, impact, and creativity.

Thank you for sharing these giving options with individuals in your networks.

For More Information

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Planned Giving with the American Technion Society

As a lay leader for the American Technion Society (ATS), you are one of our organization's most influential advocates. Potential donors can leverage a range of planned giving options that align their philanthropy with their individual financial and philanthropic goals. Planned giving is an excellent fit for individuals who may not have significant cash on hand or who are balancing a desire to give with the need to plan for a secure retirement. We hope this field guide will help you inspire your friends and family to consider making the American Technion Society part of their philanthropic legacy.



	Bequest	Donor Advised Fund (DAF) – Gifting Balance	Retirement Plan (IRA)	Charitable Gift Annuity (CGA)	Deferred Gift Annuity
How It Works	<ul style="list-style-type: none">- Donor lists ATS as the beneficiary of a will or trust- Designates a percentage, dollar amount, or residual of estate (what remains after other commitments have been fulfilled)	<ul style="list-style-type: none">- Donor establishes DAF through charitable arm of a financial institution or a sponsoring charity- Works like a charitable checking account, with donor deciding which charities receive funds each year- At death, DAF is passed on to heirs OR balance goes to sponsoring organization or designated charitable beneficiary like ATS	<ul style="list-style-type: none">- Donor designates a percentage amount to ATS	<ul style="list-style-type: none">- Donor makes a gift to ATS now, using cash or appreciated stocks, and receives annual payments for life (an “annuity”)- The older the donor, the higher the annuity- At death, balance goes to ATS	<ul style="list-style-type: none">- The donor makes a gift to ATS now, using cash or appreciated stocks, and receives annual payments in the future- Donor does not receive annuity until a later date; the longer they defer, the larger the annuity
Benefits To Donor	<ul style="list-style-type: none">- Donor pays nothing during their lifetime- Donor can revoke any time during life	<ul style="list-style-type: none">- Allows donors to support ATS with funds they have already set aside for charity, without diminishing assets for heirs	<ul style="list-style-type: none">- Donor pays nothing during their lifetime- 100 cents on the dollar goes to ATS at death (an IRA left to heirs could be taxed up to 65%)- Donor still takes withdrawals during lifetime- Donor can revoke any time during life	<ul style="list-style-type: none">- Creates reliable fixed income stream for life (payment is the same each year and can be partially tax-free)- Donor receives partial tax deduction upon establishing	<ul style="list-style-type: none">- Donor receives tax deduction upon establishing- Creates reliable income stream for life (amount is the same each year and partially tax-free)
Who It’s Right For / Clues to Listen For	<ul style="list-style-type: none">- Donors who have no children or whose children are taken care of, or donors with enough resources to provide for heirs and charity	<ul style="list-style-type: none">- Donors who (1) are not planning to pass on DAF to heirs and (2) have DAF with a financial institution (rather than another charity) may want to see funds go to ATS at death	<ul style="list-style-type: none">- Donors who do not have significant extra cash on hand	<ul style="list-style-type: none">- Donors who are planning for a financially secure retirement- ATS requires that the donor be aged 70+	<ul style="list-style-type: none">- Donors who want an income tax deduction now and greater income down the road- Attractive to donors approx. aged 60 to 70