

# QUICK PLANNER

I would like to make a gift...	Bequest	Retirement Plan/IRA/Life Insurance Beneficiary Designation	Charitable Gift Annuity	Charitable Remainder Trust	IRA Charitable Rollover <small>(Must be at least 70.5 years old)</small>
During my life					
Upon my death					

## I have the following assets available to make a gift...

Cash					
Stock/bond/mutual funds					
Real estate					
Retirement plan/IRA					
Life insurance policy					

## Benefits that are important to me are...

Income					
Income tax deduction					
Estate tax savings					
Capital gain tax savings					
Lifetime control of assets					

## If my gift provides income, I prefer that it is...

Fixed					
Variable					

Please contact Dean Regenovich, Director of Charitable Estate Planning, at 800-780-3463 or [plannedgiving@marchofdimes.org](mailto:plannedgiving@marchofdimes.org). If you have questions or would like more information, visit [marchofdimesgift.org](http://marchofdimesgift.org).

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