

PLANNED GIVING GIFTS AND OPTIONS



PLANNED GIVING WITH TIDES FOUNDATION offers you flexibility in designing an effective funding strategy that will support the types of issues and organizations that are most important to you.

Through careful estate planning, you can provide support for a designated Donor Advised Fund, or one of Tides' many funding initiatives. Planned giving with Tides Foundation means your original intent will be honored and your values and priorities will be respected.

Tides Foundation accepts gifts of cash, real estate, life insurance, retirement plan designations, and securities. We will be happy to meet with you and discuss the gifts and Planned Giving Program that best suit your needs.

GIFTS ACCEPTED BY TIDES FOUNDATION

CASH: Gifts of cash are acceptable in any form. Checks may be made payable to Tides Foundation.

REAL ESTATE: Gifts of real estate may include developed property, undeveloped land, or a remainder interest in a personal residence, farm, or vacation home.

LIFE INSURANCE: You can name Tides as a beneficiary or contingent beneficiary of your life insurance policies. Tides can also be named as the owner of whole life insurance policies.

RETIREMENT PLAN BENEFICIARY DESIGNATIONS: You can name Tides as beneficiary of your retirement plans.

SECURITIES: Tides accepts both publicly traded securities and closely held securities. Please contact Tides for specific transfer instructions.

- ♦ Publicly traded securities, include marketable securities, such as stock shares, mutual fund shares, and bonds.
- ♦ Closely held securities include debt and equity positions in non-publicly traded companies and interests in limited partnerships (LPs) and limited liability companies (LLCs), or other forms of ownership.

BARGAIN SALES: A bargain sale is a hybrid of a gift and a sale. While any asset can be the subject of a bargain sale, real estate is the most commonly transferred asset. You can sell a property to Tides below market value; the difference between the fair market value and the selling price of the property may be claimed as a tax deduction.

To learn more about Planned Giving with Tides, please contact our Planned Giving Officer at plannedgiving@tides.org or by phone at (415) 561-6348.

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