

Reichert Equine Foundation Scholarship



(319)-668-2699

www.ReichertCelebration.com

TOOLS FOR GIVING

Charitable Instruments

A variety of **giving methods**
tailored to your unique situation.



Outright Gift. You can make a gift of cash, stocks, bonds, real estate, or other assets to the Reichert Equine Foundation. Your charitable gift qualifies for tax advantage under federal law.

Bequest by Will. You can designate a gift or portion of your estate to the Community Foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes.

Charitable Gift Annuity. You can make a gift of cash or property to the Reichert Equine Foundation now, get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life.

Charitable Reminder Trust. You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to the Reichert Equine Foundation and is placed into a charitable fund you have selected. You receive income tax benefits the year you establish your trust.

Charitable Lead Trust. You can place cash or property into a trust that pays a fixed amount to the Reichert Equine Foundation for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

You receive personalized service

Each individual, family, or organization we work with has unique charitable interests...and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.



Reichert Equine Foundation
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Charitable Funds

Great giving options.
Choose the one that's right for you.



Donor Advised Funds. You can have ongoing involvement in the use of your gift. You work with our professional program staff, identifying ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most. Your recommendations are submitted to our local board for approval; we then distribute grant dollars.

Unrestricted Funds. Your gift can address ever-changing needs—including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of the equine community well-being, equine economic development, education, and more. The flexibility of your unrestricted gift enables the Reichert Equine Foundation to respond to the industry's most pressing needs, today and tomorrow.

Field of Equine Funds. You can target your gift to address needs in an important area of your equine life. You identify your personal interest area when making your gift; our board awards grants to youth across the nation involved in the equine community.

Scholarships. You can invest your gift in our community's future and show students you care, all with the guidance and personal services of the Reichert Equine Foundation. You determine the criteria students must meet to receive the Scholarships. With your assistance, students achieve their academic and career-oriented goals—from preschool to postgraduate work.

Establish a fund in your name.

Any of these funds can be established in your name, or in the name of your family, organization, or anyone you wish to honor. All grants distributed from the fund you establish—today and in the future—are then awarded to charities in the name of that fund. It's a great way to always be involved with, and remembered for, your investment.



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A Personal Legacy of giving Endowment



What is endowment?

When you create a charitable fund through the Reichert Equine Foundation you have the opportunity to benefit your community forever with a permanent endowment. Your gift is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who endow their gifts can make a difference in their community during their lifetime and, at the same time, provide a gift that lasts forever. Grants will continue to be made in the name of the fund you establish so that your charitable wishes are preserved, even if an organization receiving grants ceases to exist in the future.

Leaders of a nonprofit organization may also look to the Reichert Equine Foundation to hold their organization's endowment because they know that having a constant, source of funding helps them respond to emergency needs as well as plan for the future and sustain the good work they do.

Expert help. When donors or nonprofit organizations work through the Reichert Equine Foundation to achieve their charitable goals, they benefit from the expertise of experienced local program staff, community leadership, and investment management.

The power of endowment

A half century ago, Paul Cesarz made a choice that continues to benefit his community today. He created an endowed fund in 1952 with \$150,000 in assets. The fund immediately began earning income and distributing grants to causes important to him. Fifty years later and 35 years after Paul's death, the Cesarz Fund had grown to \$1,066,003. And in that 50th year, it generated more than \$50,000 in grants, supporting a range of community needs, a park renovation, a museum exhibit, cancer research, and more. Because Paul chose to endow his gift, he has enabled more than \$1.1 million in grants to go to his community—almost eight times the impact he would have made by giving the original gift to charity all at once. And though Paul has passed away, the fund in his name will go on supporting his community, leaving a lasting legacy.



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Gift of Appreciated Stock

More benefits



Benefits

Giving appreciated stock through the Reichert Equine Foundation is popular among a range of givers—individual investors, families, entrepreneurs, and even groups of friends who have formed investment clubs.

By giving stock through the Reichert Equine Foundation, you can avoid capital gains taxes that would be due as a result of its sale, and establish a charitable fund that benefits the local causes and organizations you care about most. With gifts of appreciated stock, your stock market earnings translate into community impact, so you get a more rewarding return on your portfolio. You can set up a scholarship or other fund to benefit the Equine Industry.

The Reichert Equine Foundation provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to the Reichert Equine Foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial advisor or contact the Reichert Equine Foundation.



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TOOLS FOR GIVING

Want to see your stock generate a better return?

Gift of Appreciated Stock



Everybody wins when you make a gift of appreciated stock to the Reichert Equine Foundation. Your gains are put to good use. Your gift of stock is reinvested in the equine community, and it qualifies for an immediate tax deduction based on the full fair market value.

How it works

- You make a gift of appreciated stock to the Reichert Equine Foundation
- Your gift can be placed into any of our charitable funds. For example, you can use your gift to create a Donor Advised Fund in your name, in the name of your family or business, or in honor of any person or organization you choose. You can then stay involved in recommending uses to the fund.
- Your gift qualifies for a tax deduction based on the full market value of your stock; you avoid the capital gains tax that would otherwise arise from the sale of this stock.
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift and all future earnings from your gift is a permanent source of community capital, helping to do good work forever.



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Reasons to Give

Ten reasons people choose to **give** through The Reichert Equine Foundation



One

We are an organization with deep roots in the equine industry.

Two

Our professional program staff has broad expertise regarding equine and educational issues and needs.

Three

We provide highly personalized service tailored to each individual's charitable and financial interests.

Four

Our funds help people invest in the educational and equine causes they care about.

Five

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

Six

We partner with professional advisors to create highly effective approaches to charitable giving.

Seven

We offer maximum tax advantage for most gifts under federal law.

Eight

We multiply the impact of gift dollars by pooling them with other gifts and grants.

Nine

We build endowment funds that benefit the equine industry forever and help create personal legacies.

Ten

We are able to coordinate resources in the equine industry to create positive change.



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