We’d like to tell you more

These ideas and examples are just a few of the ways you can support the Santa Fe Institute. There are many more ways you can make a difference by carefully planning what and when to give. Visit our Legacy and Planned Giving website at: www.santafe.edu/support/legacy-and-planned-giving/

We will be happy to provide you or your advisor with more information as you consider your plans, or help you find the kind of expertise you need, whether that be an attorney or a financial planner to make your philanthropic dreams become realities. The Office of Development can be reached at 505-946-3678.

The examples used in this publication are in no way intended to represent any one individual or family. They may or may not represent the types of gifts already received by SFI, or they may be general examples intended to illustrate common scenarios only.

The purpose of this publication is to provide general gift, estate and financial planning information. It is not intended as a legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states.

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Examples: Mr. and Mrs. Griegos were long-time supporters of the Santa Fe Institute. Even though Mr. Griegos passed away two years ago, Mrs. Griegos continues to make annual gifts and attend donor events and educational lectures. In her will, she has stipulated that the Institute receive a percentage of the remainder of her estate after those closest to her have been remembered.

Giving securities

More than 60 percent of Americans own securities, so it is no wonder that more people are giving stocks, bonds, and mutual funds to nonprofits like the Santa Fe Institute. By giving securities instead of cash, you might benefit from tax savings that allow you to make a larger charitable gift at the same cost to you. With the stock market reaching all time highs, now may be the best time to increase your impact through gifts of securities.

Example: Barbara and Ted have been making annual gifts to SFI. This year, they decide to donate appreciated shares of stock—meaning the stock is worth more than they paid for it—and find they can give much more. Because they have owned the stock for more than 12 months, they will not pay capital gains tax on the increased value and they might also be able to claim an income tax charitable deduction for the full fair market value of the stock.

Giving while receiving income

You can plan a substantial charitable gift now that will allow you, or a person you designate, to receive payments for life or for a set period of time. Assets remaining in the gift plan when the payment period is over could benefit the Santa Fe Institute. Or, if you have small children, you can designate that the payments from the gift plan benefit SFI until a benchmark event in the children’s lives—going to college, reaching the age of 25, etc. Assets remaining in the gift plan at that time revert to the beneficiary at the end of the period.

These gift plans often result in tax benefits, such as preferential treatment of capital gains and an income tax charitable deduction. They can also provide valuable income for you, your loved ones, or the Santa Fe Institute for many years.

Typical Examples: Mrs. Blake retired after a long career as the local librarian. She has securities that have substantially increased in value but yield very little income. After consulting with her financial advisor, she uses the securities to make a gift that will provide her with attractive fixed payments for the rest of her life. At her death, whatever is remaining will benefit the Santa Fe Institute. Additionally, she is delighted to learn that she will receive a substantial charitable income tax deduction in the year that she arranges the gift.

Jennifer and Wilson are very involved with their local nonprofit. They are still accumulating their wealth but have a comfortable nest egg at this time in their lives. Their children are two and four and the couple wants to provide a meaningful.