



Discover How Everyone Benefits from Planned Gifts

Your Goal

Your Gift

Your Method

Your Benefit

Make a gift that costs you nothing during your lifetime

Gifts Through your Will or Trust ("Bequest")

Include a gift of cash, property, or a share of your estate through your will or trust

A gift that does not affect your cash flow, and you can adjust your gift as circumstances change

Make a gift and receive a steady income for life

Charitable Gift Annuity, Charitable Remainder Unitrust, Charitable Remainder Annuity Trust

Share your assets with us in a plan that gives you an income for life and passes the remainder to us

Receive tax-advantaged payments for life, along with a charitable tax deduction

Make a gift while leaving more of your estate to your heirs

Gifts of Retirement Assets

Name us as the beneficiary of your retirement plan, and pass less-taxed assets to your heirs

Avoid up to 60% income tax on your retirement assets; pass more of your estate to your heirs

Make a gift while avoiding capital gains liability

Gifts of Appreciated Securities

Give us appreciated stocks, bonds or mutual funds to sell and use the proceeds

Make a significant gift; receive an immediate income tax deduction; pay no capital gains tax

Make a large gift at little cost

Gift of Life Insurance

Donate a life insurance policy you no longer need or name us in an existing one

Take a tax deduction now; take possible future deductions through gifts to pay policy premiums

Don't let a bank teller control your legacy! With a simple signature, you can designate the balance of your bank account, brokerage account, retirement plan, annuity or life insurance policy to pass to MMA after your lifetime. It's the easiest way imaginable to support Massanutten Military Academy. Just inquire at your financial institution or ask your plan administrator for a beneficiary designation form. In short, the forms you need are called a POD (Payable Upon Death) or a TOF (Transfer Upon Death).