

CHARITABLECAPITAL™ PLANNING

EMPOWERMENT

- ◆ Satisfy other financial needs by using increased cash flow generated from tax savings and partially tax-free payments.
- ◆ Convert low-yielding, high risk investments into high tax-advantaged payments.
- ◆ Benefit from tax deductions while appointing others to receive specific benefits.
- ◆ Help minimize estate tax and capital gains on contributed assets.
- ◆ Offset taxable income from other sources.
- ◆ Pin-point where you wish funds contributed in satisfying heart felt giving objectives.

OUR MISSION STATEMENT

- ◆ Assist donors in effectively controlling and using their *financial life support systems*™ to take care of themselves and their families while fulfilling their dreams and giving desires.
- ◆ Help donors maintain control of what they have while attaining more through the use of CHARITABLECAPITAL™ Planning

HOW WE ACCOMPLISH OUR MISSION

- ◆ We are sensitive to the hopes, dreams, fears, desires, values and feelings of donors.
- ◆ We maintain a vast field of knowledge while teaming with charitable organizations, legal, accounting and financial advisors.
- ◆ We think dynamically while using simple practicality in satisfying the needs concerns and objectives of our donors.



Non-Profit Contact Information Placement

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"CHARITABLECAPITAL", "A Lifetime of Receiving Through Giving", "FAMILYCAPITAL", "Planning dreams into life while giving" and "your financial life support system" are all trademarks of The Charitable Capital Design Center, LLC.

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THE CHARITABLECAPITAL™ PLANNING PROGRAM



Non-Profit Brochure Template

*Planning dreams
into life while giving™*

CHARITABLECAPITAL™ PLANNING

In order for you and your family to respect wealth and maximize its use in achieving your true financial and giving objectives, it is important to understand that wealth breaks down into three forms of *financial capital* within your **financial life support system™** surrounded by the following *financial* areas:



The three forms of *financial capital*:

Personal Capital: *Capital* in which you have control, use and ownership. This *capital* can be sold, consumed, passed on to your heirs or used to satisfy your giving desires.

Taxable Capital: The ownership, use and control of this *capital* must be given up and passed on to the U.S. Treasury through ordinary income, capital gain taxation and, again at death . . . estate taxation.

CHARITABLECAPITAL™: This *capital* is created through the conversion of *taxable capital* using the heart of tax law. In 1969, Congress passed law in order to help motivate American citizens to give more, while sidestepping the inefficiencies of our governmental revenue and disbursement systems.

Although ownership is given up, this *capital* can be maintained while self-directing your contributions to society through custom designed planned giving. You can pin-point exactly where you wish funds to be contributed in satisfying your heart felt giving objectives.

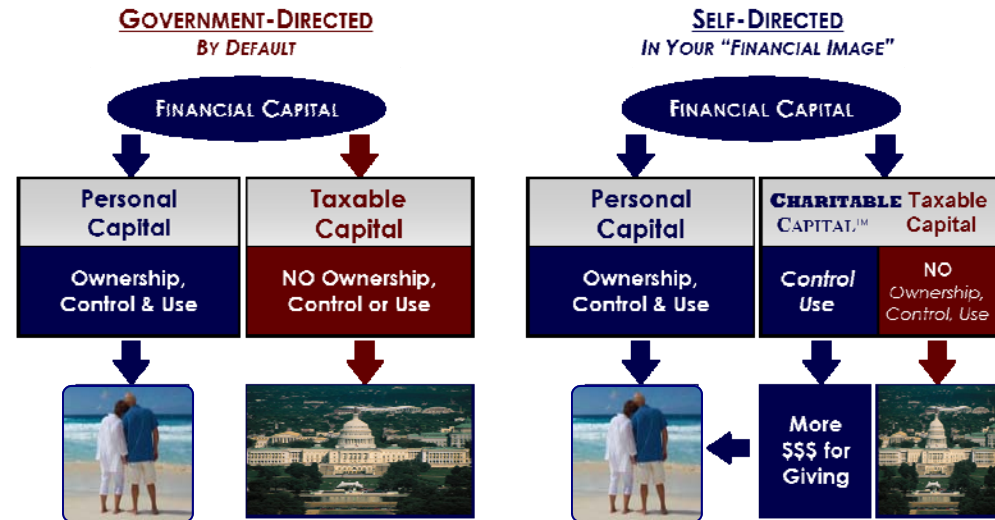
Why not use the CHARITABLECAPITAL™ planning tools which Congress has made available for over 30 years? Dynamic planning tools such as:

Remainder Trusts Pooled Income Funds Supporting Organizations Lead Trusts
Private Foundations Donor Advised Funds Leveraged IRA Giving Gift Annuities

Each of these tools can be designed to generate substantial income tax deductions, cut away capital gains taxation and eliminate estate taxation while achieving your heart felt desires.

As reflected in the diagram on the next page, Americans are all philanthropists in one form or another; either by default, government-directed or by self-directing large portions of *taxable capital* into CHARITABLECAPITAL™.

FINANCIAL OPTIONS



So, what type of philanthropists do you and your family desire to be?

Why not understand and respect the opportunities and pitfalls which surround your **financial life support system™**, using tax law effectively and taking an intelligently planned course of action in accomplishing your needs, concerns and objectives.

Such an approach can allow you, your family and future generations to experience the incredible joy of CHARITABLECAPITAL™ planning while enhancing FAMILYCAPITAL™.



Creating Bigger Waves of Giving