



DREAMBUILDERS LEGACY SOCIETY

PLANNED GIVING OPTIONS

There are several ways to establish a personal legacy that will shape futures, build dreams, and change lives for years to come.

For many legacy donors, the tax benefits* provide a substantial advantage to making a planned giving arrangement.

WILLS & TRUSTS

The most straightforward way to plan a gift with CHF is to make a charitable bequest, which can be completed in as little as one sentence in a will or trust. Bequest types include specific amounts, percentages, remainders or residues, or contingency bequests.

STOCKS AND BONDS

Next to cash, appreciated securities are the most commonly donated assets to the California Homebuilding Foundation. These securities can be stocks, bonds, or mutual fund shares. Gifts of appreciated securities generally avoid capital gains taxes,

**Limitations apply to certain tax benefits and gift options. CHF recommends consulting with your financial planner or attorney before making any decisions regarding planned giving.*

BENEFICIARY DESIGNATION

Designate CHF as a beneficiary in your IRA or other retirement plan, or life insurance policy. IRA contributions and gifts of life insurance are a powerful and flexible way for donors to leave a legacy.

DONOR ADVISED FUND

Donor Advised Funds are essentially their own public charities, typically established within large financial institutions. Since the contribution is made directly to the public charity, the tax deduction is eligible for the higher AGI limits.

Your gift to CHF ensures a prosperous future for homebuilding and shapes the lives of young professionals statewide.

Schedule a confidential conversation today with Allison Paul at 916-340-3348