

# Barrow Planned Giving Options

## There are numerous ways to leave a lasting legacy at Barrow.

The chart below outlines some of the advantages of various giving options and their associated benefits. Use this chart to identify the giving option that best fits your financial and charitable goals.

## Learn more about maximizing your gift!

Contact: Robyn Nebrich-Duda,  
Director of Planned Giving & Philanthropy,  
at [Robyn.Nebrich-Duda@DignityHealth.org](mailto:Robyn.Nebrich-Duda@DignityHealth.org)  
or 602.406.1037.

PLANNED GIVING OPTIONS	Page	Pays You Income	Barrow Neurological Impact		Tax Benefit			ADDITIONAL BENEFITS
			Immediate Impact	Impact After Your Lifetime	Potential Estate Tax Benefits	Income Tax Benefits	Capital Gains Tax Benefits	
Will or Trust Gift	03			●	●			Make a flexible gift.
Stock and Appreciated Assets	04		●			●	●	Provide an immediate benefit to Barrow.
Retirement Plan Assets	05		●	●	●	●		Allow less heavily taxed assets to be passed on to loved ones.
Donor-Advised Fund	06		●	●		●	●	You can choose your donor-advised fund to support Barrow.
Charitable Gift Annuity	07	●		●	●	●	●	Receive fixed payments for life that are not dependent on the stock market.
Life Insurance & Investment Annuities	08			●	●	●		You can utilize a policy you no longer need.
Charitable Trusts	09	●	●	●	●	●	●	Use appreciated assets to maximize your tax benefits.
Real Estate & Business Interests	10		●	●	●	●	●	Potentially save taxes and receive a tax deduction even if you only gift part of the asset.
Gift of Art	11		●		●	●	●	Support the healing mission of Barrow with a gift of art.

*The information provided is not intended as legal or tax advice. For such advice, please consult an attorney, financial or tax advisor.*