

# GUIDE TO MAKING GIFTS OF NON-CASH ASSETS



When donating non-cash assets, your clients want an efficient and straightforward process. Our experienced staff uses a simple five-step approach to provide your clients with the best giving experience possible:

1. Define your clients' charitable goals
2. Determine the best assets for giving
3. Determine the best giving method
4. Gather details on the asset
5. Transfer and sell the assets

## NON-CASH ASSETS WE ACCEPT

- Artwork
- Collectibles
- Crops
- Farm equipment
- Life insurance
- Livestock
- Publicly traded stock
- Virtual currency
- Retirement assets
- Privately held stock
- Real estate

## HERE'S HOW IT WORKS

### First, we help your clients define their charitable goals.

Make sure your clients' gifts accomplish exactly what they want. Our staff has decades of experience guiding donors. We'll lead them through a robust goal development process to understand their charitable goals and create a giving plan that reflects their values.

### Second, we work with you and your clients to determine which assets might be best to give.

Some assets are more financially beneficial to give during life and some more beneficial after death. Taking all of this into account helps to narrow the right assets for your clients' giving.

### Third, we work together to determine the best giving method.

Gifts can be made in a variety of ways with various philanthropic tools. Once we know your clients' goals and understand their assets, we can help you and them determine if a bequest, donor advised fund (DAF) or other gift method is best for their charitable goals. (At the end of this piece, you'll find a quick reference guide showing which assets can be used with the various gift methods.)

### Fourth, we gather specific details about the asset your clients wish to give.

We gather data on the asset to make sure the gift is in everyone's best interest and poses no financial or legal difficulties. We also want to make sure there is a market for selling the asset after the gift is made.

### Last, we will work with your clients to transfer ownership of the asset and begin the sale process.

We work hard to sell the asset as quickly as possible for the best possible price. After all, the ultimate goal is for them to give as much to their favorite causes as possible.



## OUR PROMISE TO YOU

- + We take great care of your clients and help them realize their unique giving visions.
- + We provide a variety of investment options to help your clients plan for both today and the future.
- + We support your clients with our full suite of philanthropic resources.
- + We offer donor advised funds, allowing you to potentially keep assets under management.

## GIFT METHODS GUIDE

ASSET	GIFT METHODS	Beneficiary Designation	Bequest	Charitable Remainder Trust	Donor Advised Fund	Gift Annuity	Retained Life Estate
	Artwork		X	X	X		
	Cash	X	X	X	X	X	
	Collectibles		X	X	X		
	Crops	X					
	IRA	X					
	Life Insurance	X			X		
	Livestock	X	X	X	X		
	Farm Machinery	X	X	X	X		
	Real Estate	***	X	X	X		X
	Stock (Private)		X	***	X		
	Stock (Public)	X	X	X	X	X	
	Virtual Currency		X	X	X	***	
401(k), 403(b)	X		***	***			

\*\*\* Possibly, depending on circumstances

Start a conversation with a Gift Planner today.  
Call 651.224.5463 or email the team at [philanthropy@spmcf.org](mailto:philanthropy@spmcf.org).