THE CHICAGO COMMUNITY TRUST®

EQUITY • OPPORTUNITY • PROSPERITY

PERPETUAL IMPACT

REALIZING YOUR **CHARITABLE GOALS WITH NON-CASH ASSETS** AT THE CHICAGO COMMUNITY TRUST

UNLOCK THE BENEFITS OF GIVING STOCK AND OTHER ASSETS

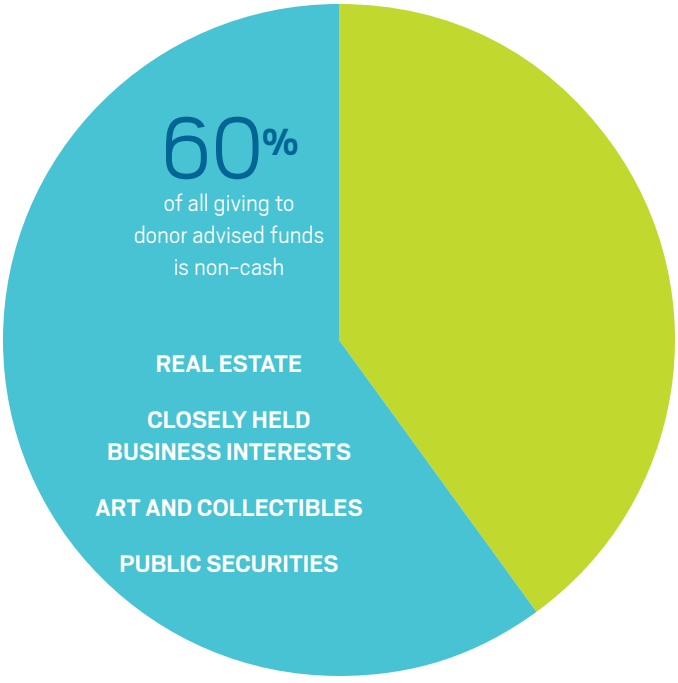
Making gifts of assets rather than income is a tax-efficient way for donors to meet charitable goals.

People have become more creative in the ways they support the causes that matter to them, as well as the methods they use to fund their philanthropic goals. Cash is not king — in recent years, nearly two-thirds of all contributions to donor advised funds nationwide were made with non-cash assets.*

Advisors often recommend that donors consider making gifts of publicly traded securities, real estate, closely held business interests, or art and collectibles as a means of realizing their charitable objectives.

For donors, the benefits take many forms and can include:

- Generous tax advantages
- Freeing up customarily donated cash for other purposes
- Providing income or diversification
- Building or expanding upon charitable goals



*The 2018 DAF Report, National Philanthropic Trust.

HOW TO TRANSFORM NON-CASH ASSETS TO REALIZE YOUR CHARITABLE GOALS

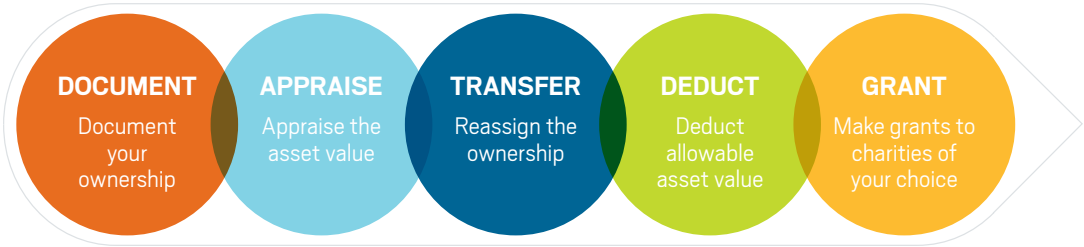
To maximize your giving potential and benefits most effectively, it pays to work with experts.

You and your advisors, in careful consultation with the Gift Planning team at The Chicago Community Trust, can turn almost any non-cash or illiquid asset into a giving strategy that will help you meet your charitable objectives.

FIVE STEPS TO TURN NON-CASH ASSETS INTO CHARITABLE GRANTS

These five steps outline a collaborative effort between you and your advisors, and the Gift Planning team at The Chicago Community Trust. This process allows you to convert your non-cash assets, enjoy benefits of tax deductibility, and fulfill your charitable goals.

This simplified roadmap depicts the general steps involved with converting a non-cash asset to charitable purposes. Additonal intermediate steps may be necessary for specific categories of non-cash assets. Please contact the Gift Planning team at The Chicago Community Trust for details.



This collaborative process can transform assets you have set aside for charitable purposes into a one-time gift or into a charitable vehicle that can be used by you and subsequent generations to support the organizations and issues that matter most to you.

See the Trust's companion fact sheets for detailed information on reaching your philanthropic goals with:

REAL ESTATE

CLOSELY HELD BUSINESS INTERESTS

ART AND COLLECTIBLES

PUBLIC SECURITIES

Your advisors are welcome to join you in a no-obligation conversation with us. Let the Trust assist you in crafting your philanthropic legacy.

Contact Our Gift Planning Team
giftplanning@cct.org

The Chicago Community Trust does not provide legal or tax advice. Please consult with your tax advisor to properly determine the tax consequences of making a charitable gift to The Chicago Community Trust.

THE CHICAGO COMMUNITY TRUST
33 SOUTH STATE STREET
SUITE 750
CHICAGO, ILLINOIS 60603
312-616-8000
cct.org