

TAX FORWARD ■ 365®

Maximize Charitable Giving Strategies

Clients with complex tax challenges, legacy plans and wealth goals may benefit from taking a more-strategic investment approach to philanthropy.

How we can help

[TOOLS & CALCULATORS](#)[SPOTLIGHT STRATEGIES](#)[ACTIONABLE INSIGHTS](#)[ADVISOR RESOURCES](#)

TOOLS & CALCULATORS

Show clients the potential tax benefits of donating cash or other property to qualified public charities.

CHARITABLE TAX BENEFIT CALCULATOR

Show clients the charitable income tax deduction available to U.S. Legacy Income Trust® Donors, and compare it with other charitable planned-giving instruments.*

CHARITABLE INCOME TAX DEDUCTION CALCULATOR

*The U.S. Legacy Income Trusts® are offered by the U.S. Charitable Gift Trust®.



SPOTLIGHT STRATEGIES

The U.S. Charitable Gift Trust® offers a number of innovative charitable giving solutions for donors, including U.S. Legacy Income Trusts® and Donor-Advised Funds.

Explore the potential benefits and advantages of U.S. Legacy Income Trusts®.

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Explore the potential benefits and advantages of Donor-Advised Funds. [LEARN MORE](#) ►



ACTIONABLE INSIGHTS

Focus and reinforce your client conversations with practical, relevant commentary from the U.S. Charitable Gift Trust®.

Combine a Roth Conversion with a Charitable Giving Strategy

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Pooled Income Funds Potentially Offer Benefits Beyond New Law Expanding IRA Charitable Rollover

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Pooled Income Funds May Continue to be Advantageous in Rising Rate Environment

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ADVISOR RESOURCES

Dive deeper into our spotlight strategies and stay on top of market trends with resources from Eaton Vance and the U.S. Charitable Gift Trust®.

State and Local Tax Treatment of Charitable Contributions

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Securing income for retirement

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Are you considering setting up a private family foundation?

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a significant part of the decision to contribute. The tax consequences of contributing to the Gift Trust or a Legacy Income Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Distributions to income beneficiaries from a Legacy Income Trust are not guaranteed by any party, and are subject to investment risk. In considering potential changes in annual distribution rates of the Legacy Income Trusts, the Trustee will assess their long-term earnings potential and seek to balance the interests of current and future income beneficiaries and the charitable remainder interests. Neither the Gift Trust nor the Legacy Income Trusts has been registered under federal securities laws, pursuant to available exemptions. Neither the Gift Trust nor the Legacy Income Trusts is guaranteed or insured by the United States or any of its agencies or instrumentalities. Contributions are not insured by the Federal Deposit Insurance Corporation and are not deposits or other obligations of, or guaranteed by, any depository institution.

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