
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®.

The Philanthropist newsletter (Winter 2023)

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The Philanthropist newsletter (Fall 2022)

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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®.

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Treatment of Charitable
Contributions

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Securing income for
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Are you considering setting
up a private family
foundation?

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