

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 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](#)[ACCESS MORE TAX FORWARD TOOLS](#)

\*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 investors, 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.

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## ACTIONABLE INSIGHTS

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

The Philanthropist newsletter (Winter 2021)

[ACCESS](#) ▶

The Philanthropist newsletter (Fall 2020)

[ACCESS](#) ▶



## 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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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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