

Ways to Give

THE GOAL OF GIFT PLANNING

is to fulfill your philanthropic wishes in coordination with your overall financial and estate planning. Whether you remember Johns Hopkins in your will or retirement account, establish a gift that provides income to you, or give appreciated stock, you ensure Johns Hopkins remains a global leader in education, research, and patient care for generations to come.



Make a World of Difference

WILLS AND TRUSTS

Flexibility of a future gift

Gifts through your will or trust can augment your current giving, support the future needs of Johns Hopkins, and even establish an endowed fund, such as for ongoing scholarship support. Naming Johns Hopkins as a beneficiary in your will or trust allows you to remain in control of your assets during your lifetime and modify your plans if your needs change.

RETIREMENT ASSETS

A convenient way to give

Whether you wish to leave a legacy to Johns Hopkins or make a difference today, giving retirement assets is convenient and tax-efficient. Naming Johns Hopkins as a beneficiary of your retirement plan supports the future of Johns Hopkins and allows you to take withdrawals during your lifetime, adjust beneficiary designations as needed, and achieve favorable tax results for your heirs.

To make an impact now with retirement assets, an IRA charitable rollover gift is a good option if you're 70½ years or older. Through an IRA charitable rollover gift, you can transfer assets (up to \$100,000 a year) directly from your traditional IRA to Johns Hopkins. The amount of your transferred gift is excluded from your taxable income and counts toward your required minimum distribution.



LIFE INCOME GIFTS

Gifts that pay you back

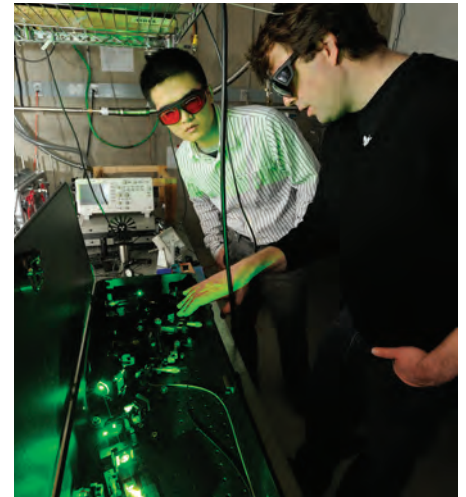
Life income gifts provide income for you and future support for Johns Hopkins. Popular options include charitable gift annuities and charitable remainder trusts. Establishing a life income gift offers several advantages:

- An immediate income tax deduction for the value of your gift
- Favorable treatment of capital gains when you fund your gift with appreciated securities
- Eligibility for charitable income tax deduction
- Flexible options to choose from, with giving minimums as low as \$10,000

STOCK GIFTS

Tax advantages

Giving stock and other appreciated securities directly to Johns Hopkins offers an appealing mix of tax benefits and direct support for Johns Hopkins. Securities are shares of common stock or units of mutual funds. Appreciated securities are those that are worth more today than when you acquired them. When you give appreciated securities you've owned for at least a year, you enjoy double benefits: Receive an immediate income tax deduction on the fair market value of your stock gift, and avoid capital gains tax.





REAL ESTATE

Multiple giving options

Real estate can take several forms, including a primary residence, a vacation home, and commercial property. Whether you give property to support Johns Hopkins now or in the future, contributing appreciated real estate is a way to make a generous, tax-advantageous gift to Johns Hopkins.

JOHNS HOPKINS DONOR ADVISED FUND

Streamline your giving

Establish one source of charitable giving through the Johns Hopkins Donor Advised Fund and simplify your giving to Johns Hopkins and other charitable organizations. The donor advised fund is a unique giving option that is tax-wise, convenient, and efficient.

CASH

Make an immediate impact

When you give cash, you receive the maximum charitable deduction and Johns Hopkins benefits from your gift immediately. Cash gifts are deductible for federal income tax purposes up to a limit of 60 percent of your adjusted gross income if you itemize deductions. When cash gifts exceed this limit, you may carry over the excess deduction for up to five additional years.



THE JOHNS HOPKINS LEGACY SOCIETY



The Johns Hopkins Legacy Society celebrates donors who support the future of Johns Hopkins with a gift from their estate or a life income gift. Legacy Society members receive special acknowledgement and an invitation to the annual Johns Hopkins Legacy Society Luncheon. If your plans include a gift to Johns Hopkins, please let us know. We want to thank you, make sure we understand your wishes, and welcome you into the Johns Hopkins Legacy Society.

CONTACT US

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Johns Hopkins does not provide tax, legal, or financial advice. Please consult your own advisors regarding your specific situation.

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