

GIVING PRIVATELY HELD BUSINESS INTERESTS

Does your exit strategy involve charitable giving? Including giving in your exit strategy can help mitigate your tax liability and benefit your community. Making a gift of privately held business interests to a donor-advised fund will give you an immediate tax deduction with the flexibility to decide when and where you want to give.

1 Complete a short donation form available at www.greaterhorizons.org/business-donations to provide us with basic details about your gift, including the nature of the business and the percentage you wish to donate.

2 Gather and send the following documents to us at corporatecounsel@greaterhorizons.org.

- ▶ Articles of Incorporation, Certificate of LP Formation or Articles of Organization
- ▶ Bylaws or Partnership/Operating Agreement
- ▶ List of Shareholders, Partners or Members
- ▶ Most Recent Financial Statement and Tax Return

3 We will contact you to discuss the gift to your donor-advised fund. If you do not have a donor-advised fund, you can quickly and easily set up a fund at www.greaterhorizons.org. There is no minimum balance required for the fund, and we will not assess any fees to the fund until after we receive your gift.

4 Sign a custom gift agreement that we will provide based on the structure of your gift.

5 Start giving! We will send a user name and password, so you can manage your fund online. You can use Greater Horizons' online portal to check your balance, view statements, and, if there is cash available in your fund, make grants to support your church, synagogue, alma mater, the arts, social services or any 501(c)(3) public charity in the country.

To learn more, contact us at info@greaterhorizons.org or 866.719.7886.