
Which Plan Fits Your Priorities?

Cato Sponsors believe that the principles set forth in our Founding documents remain a clear and forceful answer to the problems we face today. And thanks to our work, journalists, policymakers, and the public understand that the ideas of the American Revolution are alive and well. The Institute's Legacy Society recognizes the partnerships that many Sponsors have created through gift planning to help move people toward a society that is more free, open, and prosperous. Many planned gifts offer significant tax advantages and substantive ways for your dedication to our shared mission to have an enduring impact.

We hope that you will consider joining us as a partner in your legacy and a colleague in our efforts to promote a civil society based on the principles of individual liberty, limited government, free markets, and peace.

If you're interested in joining this Sponsor community, there is a wide range of charitable-giving opportunities, many providing you with significant tax advantages or costing you nothing today:

- A bequest in your will
- Naming Cato as a beneficiary of an investment account, such as IRA and 401(k) plans
- Creating a charitable trust or donor-advised fund (gifts of appreciated securities you've owned more than one year are as good as ever for avoiding capital gains taxes)



- Making a donation to fund a charitable gift annuity that pays you predictable income for life

Accepting gifts of real estate has also become more common for Cato as these contributions provide significant revenue for our mission while also creating significant benefits for Sponsors, including income tax deductions. There are several common ways you may create a gift of real estate through an agreement with the Institute.

- Contribute your property outright by executing and recording a deed naming Cato as the new owner
- Give real estate (or a partial interest in real estate) to a charitable trust, which may sell the property without paying capital gains tax and use those proceeds to create income for beneficiaries
- Name Cato as the beneficiary of a retained life estate, allowing you to continue to use the home for your lifetime
- Make a bargain sale of property to Cato for a below-market price. ■

IF YOU WOULD LIKE TO DISCUSS CATO'S LEGACY SOCIETY OR CREATING A PLANNED GIFT FOR THE INSTITUTE, PLEASE CONTACT BRIAN MULLIS AT BMULLIS@CATO.ORG OR 202-789-5362.