



Leaving a World-Class Legacy with **Planned Giving**

Year-End Tax Savings Checklist

- GIVE** charitable gifts before the year-end to reduce your income taxes.
- USE** all the money in your Flexible Spending Account before it's lost.
- PAY** your January mortgage payment early and add to your mortgage deduction this year.
- MANAGE** your IRA. If you are required to take a distribution from your IRA, consider taking only the required minimum distribution (RMD), to reduce taxable income.
- GATHER** and make early payments on deductible expenses.
- CONTACT** your tax advisor and call or email us for more ideas on how to save money on taxes this year.

Aside from traditional gifts, there are many advantages to considering a planned gift, including possible reduced tax rates, providing you with a steady stream of income, relieving the financial burden on loved ones, and fulfilling the desire to make a difference in your community. If you are interested in learning how you can make a difference with a planned gift, or see this as a way to fulfill your year-end goals, **please contact Gene Weeks, WellStar Foundation Development Officer, at gene.weeks@wellstar.org or call (470) 956-6676.**

All information presented is for general informational purposes only and should not be acted upon without qualified professional assistance. Always consult with your attorney, tax advisor, or other professional advisor to see which giving opportunity is best for you. Visit the WellStar Foundation's planned giving website at www.wellstarlegacy.org.