

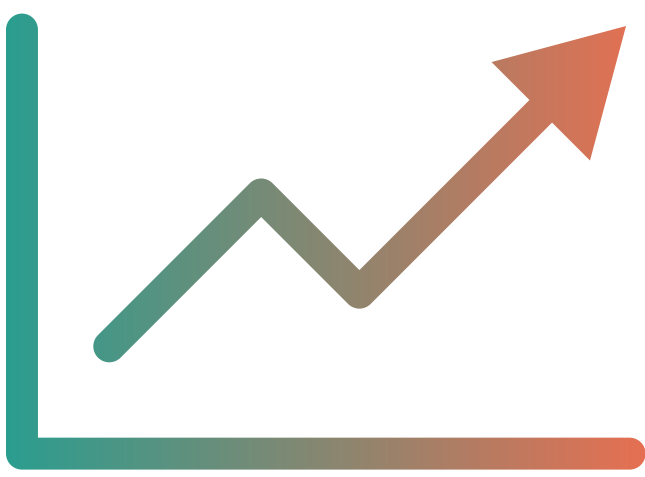
5 Ways to Maximize Your Tax

TAX DEDUCTIONS NOW

1 DONOR ADVISED FUNDS

A donor-advised fund, or DAF, is essentially a charitable savings account which gives individuals, families and businesses the flexibility to recommend how much and how often money is granted to Northside Hospital Foundation and other charities.

Essentially, you transfer cash or other assets to a tax-exempt sponsoring organization such as a public foundation. In return, you receive an immediate federal income tax charitable deduction at the time you contribute to the account. This also allows for a centralized giving and record-keeping system in one location.



2 SECURITIES & MUTUAL FUNDS

When investment values are up, many donors strategically choose to give appreciated securities, taxable IRA funds (age 70 1/2 or older), and mutual funds/stocks for the tax benefits. Securities owned for a year or more are eligible for tax deductions for the full current value of the donated securities, not the lesser amount paid for them. In addition, they are not subject to the capital gains tax that they would be if the securities were sold and proceeds were donated as cash.

3 PROPERTY

Real estate is one of the most financially beneficial types of gifts for donors. Capital gain assets, like real estate, receive special tax benefits when donated. Donating property can provide a number of benefits, including tax deductions, reduced maintenance costs and avoidance of capital gains taxes. It can also simplify estate planning by reducing the taxable estate. To discuss a gift of property or real estate, call 770.667.4483 or email foundation@northside.com.



4 Qualified Distribution from IRA

A way to avoid having IRA payouts adding to your taxable income is to direct those distributions to a qualified nonprofit organization instead. The IRS has a provision for “qualified charitable distributions (QCDs)” that allows money to be rolled directly from a traditional IRA to charitable organizations. Using this strategy, the charity benefits, but you don’t first have to claim the income or assume its tax liability.

5 Other Ways to Give

- Checks—Please be sure your check is dated and your envelope is postmarked on or before December 31. You will receive a confirmation letter regarding your gift.
- Online—Make a gift online at give.northside.com/ways-to-give/donate. Donations made by 11:59 p.m. ET on December 31, will count in that tax year. You'll receive an email confirmation of your online gift.

NORTHSIDE HOSPITAL FOUNDATION

Northside Hospital Foundation is a 501(c)(3) charitable organization, and every donation is tax deductible. The Northside Hospital Foundation connects volunteers, donors and resources to build strong and healthy communities. Your generous gift allows us to achieve this mission. Please consult your tax professional to assess the consequences of your donation options.