



Charitable Giving Opportunities for Donors

Sunshine Place's service model aims to increase equity by providing one-stop access to essential needs and support for community members in crisis or with limited means. Our programs provided over 130,000 touchpoints of service in 2024 – more than double just two years ago. With this in mind, we are working towards a long-term vision that allows us to continue to expand and refine our current resources so that every person who accesses our services can thrive. We can't achieve this without you!

Make a lasting impact with any of these choices for supporting Sunshine Place programs.

Monetary Donations

Making a singular or recurring gift by check (preferred) or credit card is always an option and may have tax advantages for you! We can accommodate automatic withdrawals from a bank account or recurring charges on a credit card at intervals you select.

Planned Giving

- **Bequest Gifts:** Choose to leave a designated monetary amount or a percentage of your estate to Sunshine Place in your official will.
- **Charitable Remainder Trusts (CRT):** This involves putting assets into an irrevocable trust. This trust then pays you or a chosen recipient a decided upon income stream for a set period. At the end of this period, the remaining assets in the trust go to Sunshine Place. A CRT may provide tax benefits and is a great way to diversify your assets.
- **Charitable Lead Trusts (CLT):** A CLT is a financial arrangement where a designated charity like Sunshine Place receives income payments for a specified period, after which the remaining assets are distributed to non-charitable beneficiaries or back to the donor. CLTs can reduce gift and estate taxes while supporting an organization you believe in.
- **Traditional IRA or Retirement Plan Beneficiary:** Naming a charity like Sunshine Place as your beneficiary for IRA or retirement allows you to support an organization you care about, with potentially significant income tax and estate planning benefits for you.
- **Real Estate Gifts:** If you gift your home or other property to Sunshine Place you receive an immediate tax benefit while continuing to live in your home as usual. The property passes to Sunshine Place once it is no longer occupied.
- **Life Insurance:** When you name Sunshine Place as your life insurance beneficiary, we receive the benefit proceeds from that policy when you pass away, ensuring that your impact endures.

Charitable Gift Annuities

This option involves donating assets, such as cash or marketable securities, to Sunshine Place. In turn, you receive an immediate tax deduction and will be given a steady stream of income for life, regardless of the economy. All while supporting a good cause!

Donor-Advised Funds

When you contribute cash, securities, or other assets to a donor-advised fund at a public charity, you are generally eligible to take an immediate tax deduction. These funds can then be invested to achieve tax-free growth and used to support charities like Sunshine Place at a pace that is comfortable for you.

Qualified Charitable Distribution (QCD)

A QCD is a direct transfer of funds, up to a total of \$100,00 per year, from your IRA custodian, after you reach age 72, to charitable organizations like Sunshine Place. A QCD will be counted as part of your required minimum distribution (RMD) if it is made after you reach age 72; prior to that time, there is no RMD. Making a QCD from your IRA can also have tax advantages.

Thank you for your support!

Reach out for support implementing one of the above gift options, or for more information:

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**Please note, this document provides a summary of common charitable gift options but is not intended as legal, tax or accounting advice and it may not be relied on for such advice. Please speak with your professional advisor with any questions regarding charitable gifts.*

**Sunshine Place is a 501(c)(3) non-profit org., EIN: 20-5398498.
Gifts are tax deductible as allowed by law.**