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Turn Tax Savings into Lake Saving!

1 message

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Turn Tax Savings into Lake Saving!



With summer winding down, we wanted to share a few tax-smart giving ideas that can benefit you while helping support the future of Pelican Lake.

All of the following items should be discussed with your tax and investment advisors to tailor the correct strategy to your particular situation.

- Donor-Advised Funds (DAFs): Contribute cash or assets to a sponsoring organization through your investment advisor to take an immediate tax deduction, then disburse grants to charities, like PLA, over time. DAFs can be a great tax strategy in a high-income year or when close to retirement. A DAF typically takes a few weeks to get an account established with your financial advisor and cannot be made last-minute.
- Appreciated Assets: Donate long-term stocks, mutual funds, or real estate directly instead of cash. You avoid paying capital gains taxes while deducting the full fair market value.
- Qualified Charitable Distributions (QCDs): Individuals who are required to make RMDs from their IRAs can transfer directly from an Individual Retirement Account (IRA) to a qualified public charity tax-free. You avoid paying tax on the QCD portion of your distribution.

Thank you for helping us continue our work to protect and preserve Pelican Lake—we're truly grateful for your continued support and generosity.

-Pelican Lake Association Finance Committee

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