Ways to Give

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Ways to Give

Gifts of Cash and Securities

A Gift by Cash or Check

Your cash gift is truly precious, providing the most financial flexibility to Public Agenda. We simply could not manage the changing demands of our work without unrestricted cash giving. A gift made by check is the most common and convenient way to give. Gifts may be made outright or you can arrange to pledge your giving over a period of up to five years. Checks should be made payable to Public Agenda Foundation, Inc. If you prefer, you may make a secure, online donation using your MasterCard or Visa. If you itemize your tax deductions, your gift is fully deductible up to 50% of your adjusted gross income. Any excess may be carried forward for up to five additional years. A general purpose gift is always the most helpful to us, however, if you wish to designate the use of your gift, you may do so at the time you make the gift by enclosing a brief note. We will make every effort to accommodate your preference and wishes.

Securities

A gift of securities such as stocks, mutual funds, and bonds, can provide attractive benefits in some circumstances. An outright gift of long-term appreciated securities (securities held for more than a year) avoids capital gains taxes and in most cases, the donor obtains a charitable income tax deduction equal to the market value of the securities.

Gifts of Closely Held Stock

An owner of closely held stock may give the stock to Public Agenda and receive important financial benefits. Closely held corporations are corporations whose stock is owned by family members and/or by business associates. The stock is private in that it is not publicly traded, and in most cases there are restrictions on the transfer of the stock to third parties.

Donors considering a gift of closely held stock must not enter into a prior written agreement with either the closely held corporation or a potential third-party purchaser. The transfer should be an arms-length, independent transaction. Donors should consult with their attorneys or tax advisors.

Employee Matching Gifts

Many employers have a policy that they will match your charitable donation, thereby doubling or tripling your giving to Public Agenda. Generally, to take advantage of your employer’s gift matching program you should:

- Check with your Human Resources Office to see if your employer offers this benefit.
- If they do, complete the company matching gift form they will provide and return it to us if possible.
- Alert Public Agenda that you are trying to secure a matching gift.
Bequest and Planned Gifts

Some people chose to make a profound difference through generous donations, sometimes made through a bequest in their will. These kinds of gifts create a legacy of helping others and they often provide substantial tax advantages. The simplest most common planned gift is a simple bequest through your will or living trust. Because it is often family members who are put in a will, we consider a bequest gift one of the highest honors a donor can bestow and we are pleased to include those who make bequest gifts of $25,000 and more in our leadership giving society, Public Agenda Partners.

You can arrange with your attorney and financial adviser to make a gift from your estate. These professionals can also describe the tax advantages involved in your particular circumstances. Often the gift language reads: "I give, devise, and bequeath to Public Agenda Foundation, now or formerly in the City of New York, 6 East 39TH Street, 9th Floor, New York, NY 10016 (dollar amount, percentage, or __ percent of the rest, residue, and remainder of my estate), to be used for its general purposes."

For your reference and convenience, our IRS Form 990 and a document verifying our tax-exempt status are available on PDF through a link on the “Support Us” page of our website. The following information is often useful for arranging a bequest gift:

Legal Name
Public Agenda Foundation, Inc.

Legal Address
6 East 39TH Street, 9th Floor, New York, NY 10016

Nonprofit Status
501(c)(3) Public Charity

There are other ways to make a planned gift. Some of the most common kinds of planned giving include:

Gifts of Life Insurance

There are different ways in which you may use life insurance to make a gift to Public Agenda:

- Make a gift of an existing life insurance policy.
- Establish a new policy and name Public Agenda Foundation as the owner and beneficiary of the policy.

A word about Life Income Gifts

Many gift are arranged so that the donor can receive direct financial benefits in ways that are well worth exploring. These benefits include an income for life for the donor and/or the donor's spouse and a charitable income tax deduction, in addition to the positive outcome and good feeling that comes from making a gift to an organization like Public Agenda. In particular, some of the financial benefits that can come with a life income gift include:

* A stream of income for the lifetime of the donor and/or the donor's spouse
* A charitable income tax deduction
* An opportunity to establish an endowed fund in the donor’s name or the name of a loved one
* Possible avoidance of capital gains taxes on gifts of appreciated property
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* A higher yield than from current investments
* A reduction in federal estate taxes

Your interest in a life income gift could set a powerful example for other donors considering Public Agenda and we would be pleased to discuss the concept with you. It is important to note that due to need for financial administration, these kinds of gifts require a minimum donation of $50,000. They also require the involvement of legal and financial planning advisers.

In-kind Donations

Sometimes instead of giving money to a charity to buy needed goods, the goods themselves are given. These are called in-kind donations. Public Agenda accepts in-kind donations of items on a case-by-case basis that can be productively put to work. We are very grateful for all donations, however, Public Agenda is not always able to accept every gift because of the changing needs of work.

In-kind donations are often tax deductible under IRS rules based on the fair market value, which is the price the items would sell for on the open market. If you wish to deduct your in-kind gift you should refer to IRS Publication 561: *Determining the Value of Donated Property*. The IRS has special forms for the deduction of gifts valued over $500. For donations valued over $5,000 the donor must seek a qualified appraisal of value. For your reference and convenience you can find Publication 561 and other IRS information and forms at www.irs.gov.

Thank you for your generosity to Public Agenda Foundation, Inc.