

## Gifting assets to charities

### To gift assets to a charity

1. Go to the **Edit** menu – **Estate Planning** category – **Planner** tab. To create an estate planning scenario, click the **Duplicate** button (Figure 1). The *Estate Planning Scenario Setup* dialog box opens (Figure 2).

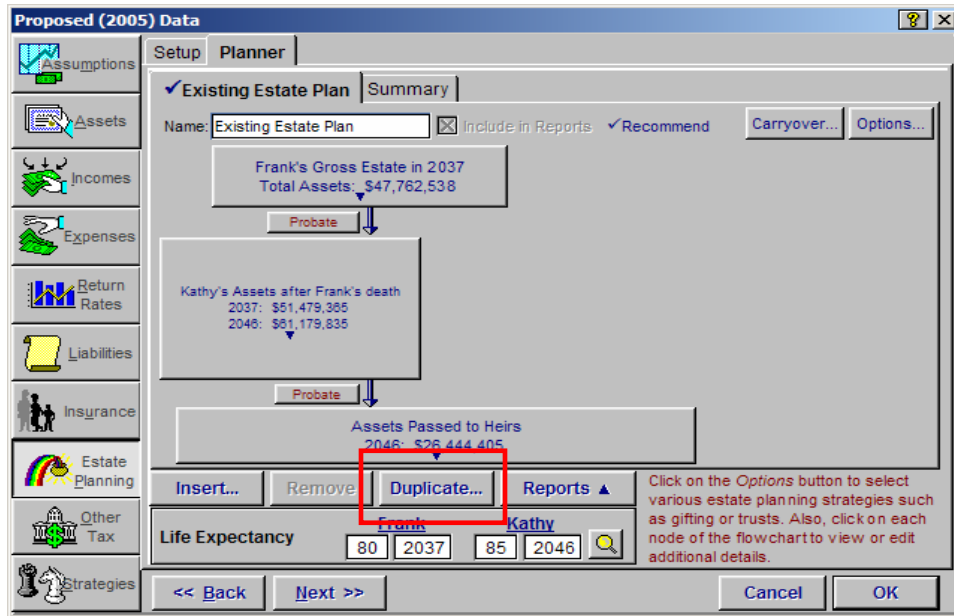


Figure 1

2. Name the scenario, and then under *Estate Planning Tools*, select the **Gifting** check box (Figure 2).

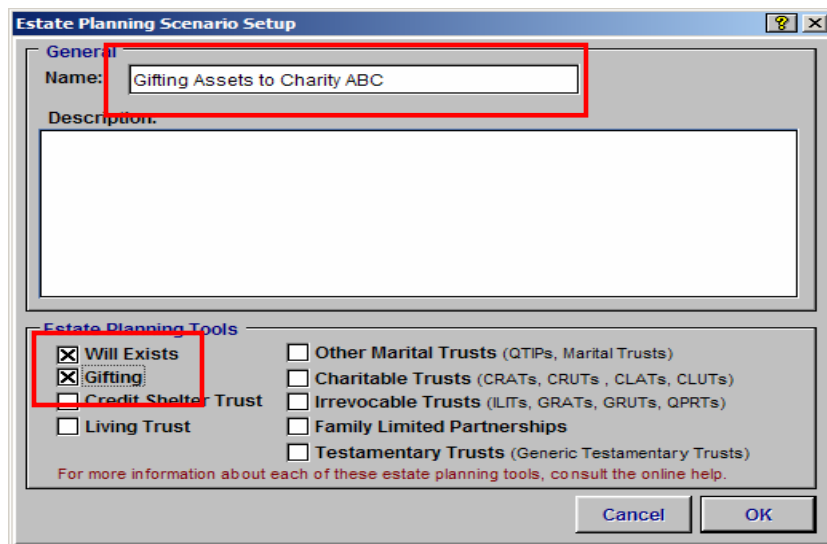


Figure 2

3. Click **OK**. A new subtab, named after your newly created scenario, appears (Figure 3).
4. Click the **Gifts and Bequests** node in the flowchart, and then select **Edit Asset Gifting Strategies** (Figure 3). The *Asset Gifting Strategies* dialog box opens (Figure 4).

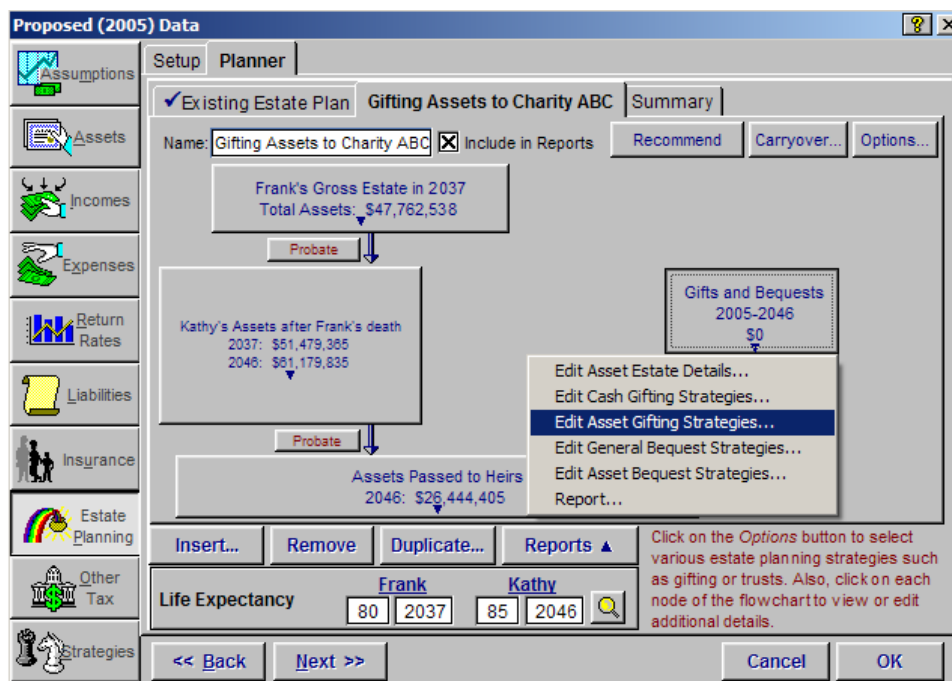


Figure 3

5. Click **Insert** and the *Asset Gifting Strategy* dialog box opens.
6. Select an asset that is to be gifted from the *Source Asset* list. Select a charity from the *Gifted to* list, and then indicate the amount, and the date or event when the asset is to be gifted (Figure 4).

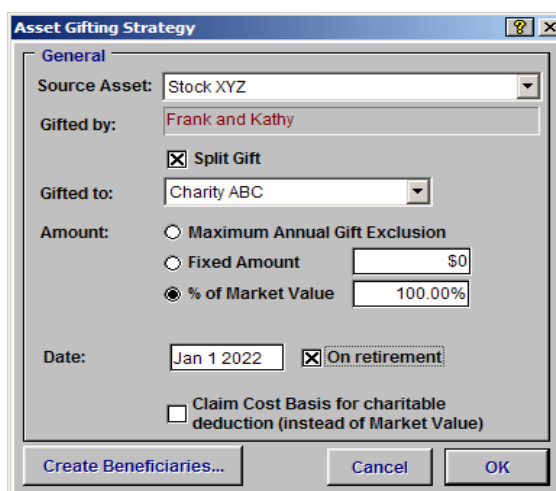


Figure 4

7. Click **OK**, and then click **OK** again to return to the *Estate Planning Scenario* flowchart (Figure 5).
8. To implement the *Estate Planning Scenario* into the financial plan, click the **Recommend** button (Figure 5).

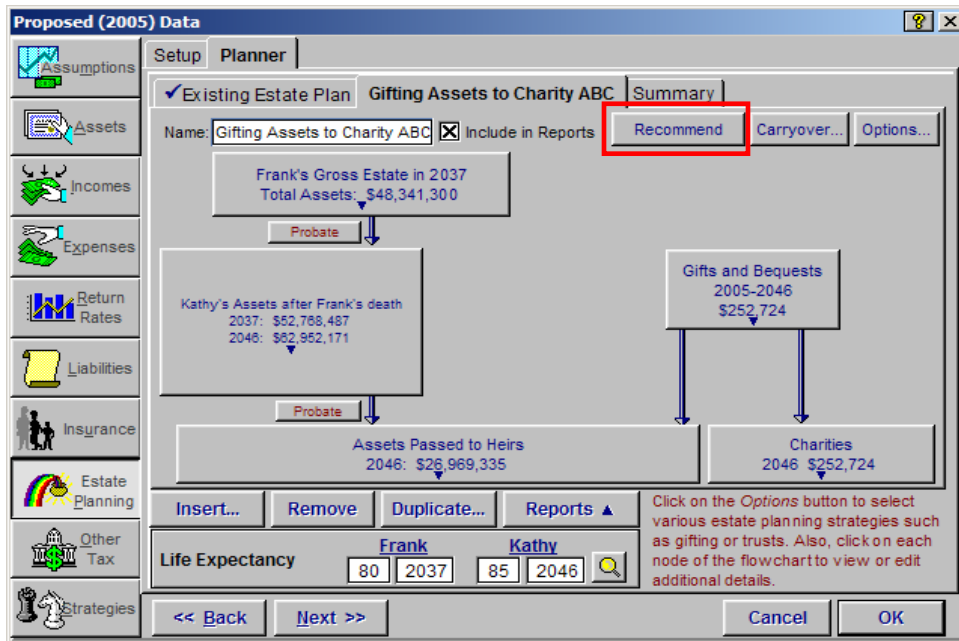


Figure 5

The blue check mark is moved to the new scenario's tab, confirming that this scenario is implemented into the plan (Figure 6).

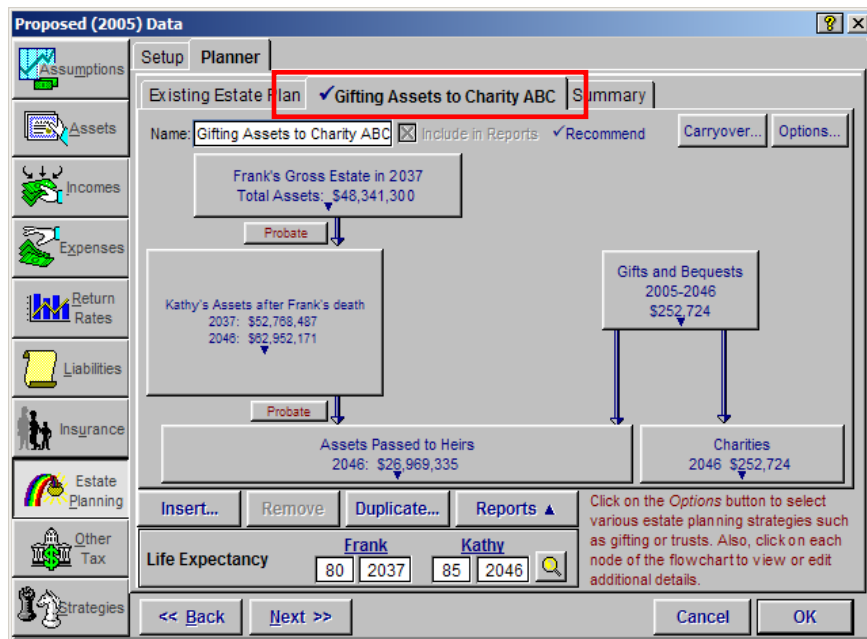


Figure 6