



YOUR HOME IS THE KEY TO YOUR FUTURE

Do you own a personal residence or vacation home that has appreciated over time? If you are like many individuals, at some point you will want to sell your property, look for ways to increase your income, and avoid paying capital gains tax.

CASH OR INCOME FROM THE SALE OF YOUR HOME

Here are just a few of the plans that help provide you with income, cash, and a charitable deduction for a gift of your home or vacation residence. If you have questions about any of these plans, please contact us at: donations@sandiegozoo.org or 619-557-3947.

TAX-FREE SALE IN A TRUST

Did you know that you can transfer your home tax-free and receive income for the rest of your life? A charitable remainder unitrust permits the sale of your home tax-free and then provides you with income and a current charitable income tax deduction for the remaining trust principal, which will go to San Diego Zoo Global.

CASH PLUS A TRUST

If you like the idea of the unitrust but want some cash up front when your property sells, you may be interested in a sale and unitrust. Contact us to learn how you can receive cash income and a charitable deduction from this plan.

AVOID TAXES AND RECEIVE A CHARITABLE DEDUCTION FROM THE SALE OF YOUR HOME

BARGAIN SALE

A bargain sale is another way to sell your home in a tax-friendly manner. By selling your home to us at a discount, you will receive a charitable deduction for the difference between the market value and the sale price. Your \$250,000 home exclusion (\$500,000 for married couples) may cover the taxable gain on the cash you receive for the sale of a personal residence and any remaining gain may be offset by your charitable deduction.

STAY IN YOUR HOME AND RECEIVE A CHARITABLE TAX DEDUCTION

LIFE ESTATE RESERVED

If your goal is not more income but the ability to live in your home and receive a current tax deduction, a life estate reserved may be the plan for you. With a life estate, you deed your home to the Zoo but reserve the right to continue using it for life. You benefit from a current charitable tax deduction and we receive your home in the future.

LIFE ESTATE GIFT ANNUITY

If your goal is to receive income and remain in your home, a life estate gift annuity (LEGA) may be the plan for you. With a LEGA, you deed your home to the Zoo but reserve the right to continue using it for life. You benefit from a current charitable tax deduction as well as fixed payments for your lifetime.