

“Yes, I would like to give my home to Sidwell Friends but live in it during my lifetime.”

YOUR GIFT

A retained life estate: You can remain in your home.

Sidwell Friends will accept a gift of either a primary or vacation residence. In the deed, you retain a “life estate” that gives you the right to live in the home, typically for life.

The property must be unmortgaged and must not subject the School to environmental or other liabilities.

You agree to have the home appraised and to be responsible for maintenance, insurance, and taxes on the property.

You receive an immediate income tax deduction.

YOUR PHILANTHROPY

- **Support Sidwell Friends:** The School will gain full ownership of the residence upon your death.
- **Create a meaningful memorial:** You will have the satisfaction of making a significant gift. You can make this gift **in honor or in memory** of someone you select. You also may designate **the use** of the remaining balance as long as your request is in harmony with the mission and priorities of the School.
- **Offer options to the School:** Upon your death, the School will have the option of using the residence in its educational mission or selling it and using the proceeds for its current and future educational activities.

YOUR BENEFITS

- **Maintain your lifestyle:** Your future gift will not affect your current lifestyle.
- **Current tax deduction:** You will receive a current income tax deduction.
- **Reduced estate tax:** The residence will not be subject to estate tax at your death.
- **Avoid capital gains tax:** If your residence has appreciated in value, you will avoid the capital gains tax that would have been due had you sold it in your lifetime.
- **Recognition in perpetuity:** During your lifetime and thereafter, you will be recognized annually on the School’s website, in annual reports, and at special events as a member of The Thomas and Frances Sidwell Society. Or, if you prefer, your gift can be anonymous.

YOUR OPTIONS

- **Manage the timetable:** You can choose to transfer the home to Sidwell Friends after a stated interval of your choosing or upon your death.
- **Rent your home:** During the period of your possession, you can either rent or occupy your home.
- **Donate the entire property now:** If you prefer, rather than retaining possession, you can donate the entire property now, under the conditions above, and receive an income tax deduction for the full value.
- **Provide for your spouse:** You may stipulate that your spouse may continue to occupy the home, if he or she survives you.

All donors are encouraged to confer with their own financial planners or attorneys.