



Giving Shelter

A Campaign for Bell Family Shelter

Ways to Give

Pledges to the Giving Shelter campaign may be paid over 3 years

Cash

Bell Socialization Services gratefully accepts gifts of cash, check, credit card, or electronic funds transfer (EFT)

Publicly Traded Securities

Gifts of appreciated stocks held more than one year, transferred directly into Bell's account from yours are a way to make a substantial gift and avoid tax liability. Please contact us for *Securities Transfer Instructions*

Individual Retirement Accounts (IRA) Rollover

You may transfer up to \$100,000 directly from your IRA to Bell if you are age 70 ½ or older. Contact your IRA account holder

Qualified Charitable Distribution (QCD) from your IRA

QCDs given directly to Bell are untaxed. NEW: The SECURE Act 2.0 allows a one-time \$50,000 transfer to a CRUT, CRAT, or CGA yielding income to for a lifetime and tax benefits. Speak to your IRA account holder to initiate.

Life Insurance Policies and Charitable Gift Annuities (CGA)

Naming bell Socialization Services as beneficiary of a policy or donating a life insurance policy outright can be a very significant gift. CGAs provide fixed payments for life in exchange for a gift of cash or stock to Bell.

Grants and DAFs

Grants from private/family foundations and donor-advised funds are greatly appreciated

Gifts of Equipment and Items for Direct Use

Any such gifts must have a use directly related to Bell's purpose and be a budget-reducing donation. Such gifts are subject to review and acceptance on a case-by-case basis.

In Kind/Tangible Personal Property

In kind donations may be sold by Bell with proceeds used toward the campaign or within Bell's operations to reduce expenses. Such donations must be in accordance with IRS rules and Bell's Gift Acceptance Policy.

Closely Held Stock

Such gifts must be approved by Bell's Board of Directors prior to acceptance

Real Estate

Real estate gifts must be approved by Bell's Board of Directors prior to acceptance

Other Property

Non-cash property such as mortgages, notes, patents, copyrights, etc. may be accepted upon approval by the Board of Directors

Your gift may qualify as a charitable deduction for federal income tax purposes. Please consult your tax advisor or the IRS.

Bell Socialization Services has tax-exempt, charitable nonprofit status under IRS code 501 (c)(3) and is further defined under 509(a)2. The official registration and financial information of Bell Socialization Services may be obtained from Pennsylvania Department of State by calling toll free within Pennsylvania (800) 732-0999. Registration does not imply endorsement. **Bell's EIN is 23-1896438.**

For assistance, contact Peggy Davidson, Philanthropy Officer

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