Estate or Planned Giving

Planned Giving helps lay the groundwork for the future of Hamden Hall with little to no cost to donors during their lifetime.

- **Name Hamden Hall in your Will or Trust** - There is no average size of a bequest, and gifts have ranged from $1,000 to $1 million. This future gift has no cost now. Hamden Hall receives funds upon the passing of the donor.

- **Retirement Accounts** - You can make a significant gift to Hamden Hall with retirement plan assets – including an IRA Charitable Rollover – without adverse effects to your lifetime finances. Designate Hamden Hall to receive all or a portion of the assets held in your retirement plan.

- **Stock and Investment Accounts** - Gifts of appreciated stock or securities allow the donor to receive an income tax deduction for the fair market value on the date of transfer, no matter what you originally paid. This gift also allows the donor to avoid paying capital gains tax.

- **A Gift of Real or Personal Property** - Unnecessary assets can be put to good use under the pines. Simplify your estate and avoid estate taxes.

Establish a Scholarship or Endowed Fund

Honor or memorialize a loved one by naming a fund that will provide educational opportunities to future generations of students.

Donor-Advised Funds

Support charitable organizations you care about, such as Hamden Hall, and involve your family in your philanthropic decisions. Contributions into a donor-advised fund are generally eligible for an immediate tax deduction.

To learn more about our Enhanced Giving Programs, please call the Office of Advancement, 203.752.2616.