



Guide to Giving

There are many ways to support preservation work that happens everywhere in Vermont, including your own community.

Historic preservation is at the core of our work and we know that something special happens when we use it to strengthen the social fabric of Vermont communities.

For more than forty years, PTV has been working at saving buildings in each corner of Vermont and every town in between. We help communities keep gathering places alive and encourage the vitality of our downtowns and village centers while retaining the integrity of the surrounding rural landscape.

We invite you to support our work by donating today or making a planned gift. (Please read our Pillars of Preservation for planned giving information.)

We are committed to inspiring a strong culture of philanthropy and community engagement, which are essential elements in the forward momentum of preservation in Vermont.

Please contact us anytime: 90 Main Street, Suite 304, Montpelier, VT 50602.

Ben Doyle, *President*: ben@ptvermont.org. Lisa Espenshade, *Development*: lisa.esp@ptvermont.org



Your gift, your way. It is easy and we are grateful for your support!



Give by credit card

Make a one-time donation or a monthly recurring gift quickly and securely through our website: <https://ptvermont.org/about/give/>.

You can also call us at 802-658-6647 to make a credit card gift by phone and we will securely process your gift for you. (Please don't leave confidential information by voice mail.)



Mail a check to our office

Please mail your check to the Preservation Trust of Vermont, 90 Main Street, Suite 304, Montpelier, VT 50602. We appreciate you telling us how you (or your family) would like to be listed in our Annual Report. Let us know if the gift is in honor or in memory of someone important to you, or if your contribution is anonymous.



Give mutual funds, stocks and bonds

You can make a tax-deductible gift by transferring appreciated stocks, bonds or mutual funds electronically, through your broker. Your contribution will be tax deductible at the fair market value of your donated holdings. We sell your contribution as soon as received. Keep in mind, if you are donating funds that have lost value, it is wiser to sell them and donate the cash to PTV. You will be able to take a loss on your taxes as well as the tax deduction for the donation. **Please let us know if you are making a gift of stock!** Our broker: Charles Schwab & Co. DTC: 0164. Account No: 7213-8024. FAO: Preservation Trust of Vermont--pass through account. Tax ID: 03-0281195



Make a gift from your IRA

A Qualified Charitable Distribution (QCD) allows people who are 70½ years old or older to donate up to \$100,000 total to a charity (or several) directly from a taxable IRA. As of 2023, this gift can be counted toward your Required Minimum Distribution (RMD), which kicks in at age 73. This is an increasingly popular gift mechanism. Although the transfer does not qualify for a charitable deduction, the donor does not pay income tax liability on the transferred amount. Beginning in 2024, the annual QCD limit will be indexed to inflation, resulting in larger allowable charitable transfers from IRAs year after year! At the end of this document is a sample letter you may submit to your IRA administrator.



Make a gift of an insurance policy

A donation of a fully paid-up, cash value life insurance policy that you no longer need can be an easy way for you to make a generous gift and receive an immediate income tax charitable deduction. You may also make PTV the beneficiary of a life insurance policy, but we cannot take responsibility for premium payments. Please contact giving@ptvermont.org or (802) 658-6647 for more information on donating a life insurance policy.



Your gift can include a tribute

You are invited to dedicate any contribution to PTV in honor of or in memory of someone important to you. If you like, we will send a card to the person or family in whose name the donation is made; just remember to include the contact information with your contribution. All tributes are listed in our Annual Report.



Your workplace might match your gift

Many employers offer matching contributions, which is a great way to double or triple the impact of your gift. As a registered 501(c)(3) non-profit organization, we are eligible for many employers' matching gift programs. Contact your employer to request a matching gift form.



Business sponsorship

There are several ways to sponsor our work and we are happy to talk with you to tailor a plan that meets your business's community engagement priorities. Businesses might also want to be sponsors of workshops, conferences, or events.

Ways to Give	When can I arrange this?	When does PTV benefit?	How do I, the donor, benefit, and when?
Checks/cash	Today, or any day	Immediately	You receive a tax deduction immediately, to the limit of the law.
Stock, bonds and mutual funds that have increased in value.	Today, or any day	Immediately, once PTV sells the stock	You receive a tax deduction immediately, at fair market value, AND pay no capital gains tax on shares that have increased in value.
Stock, bonds and mutual funds that have lost value.	Reconsider donating these and consider check/cash instead	Immediately	If shares have lost value it is usually better to sell them, take the loss, and donate the cash.
A tribute gift	Today, or any day	Immediately	A tax deduction for the gift, and PTV can send a note to the person you are honoring.
A gift from your IRA	Today, or any day	Immediately	A tax deduction for the gift, AND it can count toward the Required Minimum Deduction if the donor is 73 or older.
Insurance: a paid-up policy with cash value	Today, if you donate the policy itself	Immediately	A tax deduction if the policy is donated.
Employer matching gift	Ask your employer. Usually you make a contribution first, then complete a form from your employer.	When employer issues match, which might be sometimes several months after your gift was made.	You will double (or even triple) your gift's impact, but the "match" does not count as a tax benefit for you.
Business sponsorship	Anytime for a general or project support. Event sponsorships occur throughout the year.	Immediately, and in some instances during planning processes.	Business receives a tax deduction immediately, to the limit of the law, or this may be considered a marketing expense.

It is always wise to consult your financial advisor before making a charitable gift, but setting up the gifts listed above does not require professional assistance. Please reach out to us if you have other ideas for supporting PTV, like a gift of property or a special project.

IRA Charitable Request form

Dear Administrator:

Pursuant Sec. 408(d)(8) of the Internal Revenue Code, please accept this letter as my request to make a Qualified Charitable Deduction from my Individual Retirement Account #_____. I am 70 1/2 years old or older. Please issue a check in the amount of \$ _____ payable to: **Preservation Trust of Vermont** (TAX ID#: 03-0281195) and mail it as soon as possible, but to arrive no later than December 31 this year, to:

Preservation Trust of Vermont
90 Main Street, Suite 304
Montpelier, VT 50602

In your communication to Preservation Trust of Vermont please include my name and address as listed below as the donor of record in connection with this transfer. In addition, please note how I/we would like to be recognized in their Annual Report. Please copy me on your transmittal. If you have questions, contact Ben Doyle, President (802) 658-6647, ben@ptvermont.org.

Thank you for your assistance in this matter.

Sincerely,

Print Name

Name/s as should appear in PTV's Annual Report

Mailing Address

Email Address

Phone

Signature

Date