



# Four things to know about taxes and giving

Winning strategies  
for supporting  
Zeta Beta Tau in 2021



**ZETA BETA TAU**  
FOUNDATION

## **Giving makes a difference. Planning increases your impact.**

<b>Have a strategy</b>	There are distinct advantages to planning ahead. You may benefit from maximizing gifts in a tax year rather than spreading gifts out equally every year.
<b>Give from your IRA</b>	If you are 70½ or over, you can make a tax-free transfer directly to Zeta Beta Tau Foundation that counts toward your required distribution if one is due. Ask for details.
<b>Avoid capital gains tax</b>	A gift of appreciated stock or real estate held more than one year avoids capital gains tax.
<b>Know the tax rules</b>	If you do not itemize, you may still take up to a \$300 above-the-line deduction for cash donations in 2021 (\$600 for married couples).



Contact us for information about tax-wise ways to support our mission to prepare and develop leaders. Be sure to ask for our free brochure, *Tax Planning—10 Strategies for Success*. Now is the time to plan.

Faron A. Lewitt  
Chief Executive Officer  
Zeta Beta Tau Foundation  
3905 Vincennes Road, Suite 100  
Indianapolis, IN 46268  
  
317-506-7066  
fle Witt@zbtfoundation.org  
[zbtfoundation.org/plannedgiving](https://zbtfoundation.org/plannedgiving)

Be sure to consult your tax and financial advisors when considering any planned gift.



## Plan how you will make an impact for Zeta Beta Tau brothers

- Please send your free brochure, *Tax Planning—10 Strategies for Success*.
- Please send information about making a gift of appreciated stock or other appreciated property.
- Tell me about simple ways to include Zeta Beta Tau Foundation in my estate planning.
- I would like to know more about making a gift from my IRA (ages 70½ or over).
- Please send information on

\_\_\_\_\_

Name \_\_\_\_\_

Phone number \_\_\_\_\_

Email \_\_\_\_\_

Please tear at the perforation, fold this panel to the inside and tape securely closed.

Zeta Beta Tau Foundation  
3905 Vincennes Road, Suite 100  
Indianapolis, IN 46268



## Thank you!

Every gift to Zeta Beta Tau Foundation is important. We're grateful for our generous brothers across the globe who support our mission, and we're committed to thoughtful stewardship of every dollar we receive. In that spirit, we are sharing this reminder of four important things you should know about taxes and charitable giving. Thank you for your generosity.

Director Emeritus Brother Bruce H. Weinstein, Psi (University of Alabama) 1970



PLACE  
STAMP  
HERE

ZETA BETA TAU FOUNDATION  
3905 VINCENNES RD STE 100  
INDIANAPOLIS IN 46268-3000

