



Dana J. Holt, JD RICP AEP® CAP®

Dana is an author, charitable gift planning educator, professional speaker, and consultant. She teaches fundraisers how to raise millions more by accessing wealth, not just cash. Before starting HOLT Consulting Dana began her career as an estate planning attorney and then spent 13 years at a Fortune 300 Financial Services company. She helped wealth advisors all over the U.S. with their most complex cases and taught them how to integrate charitable planning into their practice.

Dana has been quoted in Forbes and has been a featured writer for the Thomson Reuters Estate Planning Journal. Dana teaches gift planning through public speaking and her online training program, Turning Wealth Into What Matters™.

Dana is a graduate of Mitchell Hamline School of Law and Southern Illinois University. She served as Chair of the MN Gift Planning Association in 2020 and 2021 and is an avid gardener at her home in the Twin Cities where she lives with her retired racing greyhound.

To contact Dana, email
Dana.Holt@HoltGiftPlanning.com

TURNING WEALTH INTO WHAT MATTERS™

Learning through the Turning Wealth Into What Matters™ resources will give you what you need to be a confident gift planner.

This amazing content can be delivered to you in the following ways:

Professional Speaking

Online Courses

Turning Wealth Into What Matters Book

Learn more at
HoltGiftPlanning.com

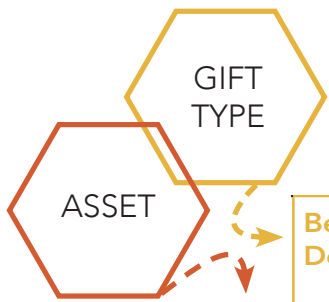
THE GIFT GRID

A tool for gift
planning professionals



HOLT
CONSULTING

Turning Wealth Into What Matters™



MATCH AN ASSET TO THE RIGHT GIFT TYPE

	Beneficiary Designation	Bequest	CLT	CRAT	CRUT	Donor Advised Fund	Gift Annuity	Life Estate	Outright
Annuity	YES	NO	NO	NO	NO	NO	NO	NO	NO
Art	NO	YES	YES	NO	YES	YES	NO	NO	YES
Cash	YES	YES	YES	YES	YES	YES	YES	NO	YES
Collectibles	NO	YES	YES	NO	YES	YES	NO	NO	YES
Crops	NO	YES	YES	NO	YES	YES	NO	NO	YES
IRA	YES	NO	NO	YES ⁶	YES ⁶	NO	YES ⁶	NO	MAYBE ¹
Life Insurance	YES	NO	NO	NO	NO	YES	NO	NO	YES
Livestock	NO	YES	YES	NO	YES	YES	NO	NO	YES
Machinery	NO	YES	YES	NO	YES	YES	NO	NO	YES
Patents/ Copyrights	NO	YES	YES	NO	YES	YES	NO	NO	YES
Real Estate	MAYBE ²	YES	YES	NO	YES	YES	NO	YES	YES
Stock (Private)	NO	YES	YES	NO	MAYBE ³	YES	NO	NO	YES
Stock (Public)	YES	YES	YES	YES	YES	YES	YES	NO	YES
Virtual Currency	NO	YES	YES	MAYBE ⁴	YES	YES	MAYBE ⁴	NO	YES
401(k), 403(b)	YES	NO	NO	NO	NO	MAYBE ⁵	NO	NO	NO

1: Outright gifts of IRA assets available as a Qualified Charitable Distribution. Donor must be 70.5 years or older at time of gift; limited to \$100k per donor.

2: If state allows "Transfer on Death Deed"

3: Extreme caution on S Corp Stock. Donation of S Corp stock to CRT will result in loss of S election for entire company.

4: Illiquid assets are generally not recommended due to increased risks to charity or CRT.

5: Beneficiary Designation gift only.

6: Limited to one \$50,000 distribution per lifetime; further limitations apply.