

Leaving a Legacy

Legacy gifts through **ABC Organization** give a donor the opportunity to make a larger charitable donation, while providing a stable funding source for **ABC Organization**.

You have many options to choose from, some of which might enhance your immediate financial security and/ or that of your loved ones. All options help **ABC Organization** by lessening the yearly fundraising needs for our programs and services.

You may want to consider the following:

Bequests: A bequest is a gift made through your will that directs the estate's personal representative or trustee to make a gift from your assets to **ABC Organization** after you die. Bequests may be used to provide gifts of money, stocks, real estate, or other property such as art or jewelry.

Endowment Legacies: Endowments are named gifts that start at \$50,000 and are invested in perpetuity. The annual interest income from an endowment then supports specific programs and needs at **ABC Organization**. Endowments are established through outright gifts, a will, insurance or retirement policies, trusts and other planned gifts.

Charitable Remainder Trusts: Charitable remainder trusts allow you to transfer assets into an irrevocable trust that will provide you and or your beneficiaries with fixed percentage payments for life, or for a set period of time. Upon termination of the trust, the remaining assets are distributed to **ABC Organization** to be used for the purpose specified by the donor.

Charitable Annuity Trust: With a charitable annuity trust, the donor transfers assets to **ABC Organization** in exchange for a guaranteed, fixed annuity payment to them or another beneficiary for life. Upon the death of the donor, **ABC Organization** receives the full amount of the initial gift to use as specified in the agreement.

Life Insurance: The gift of a life insurance policy can be a great way to combine charitable objectives with tax advantages to the donor. This is possible because donors may receive an income tax deduction by naming **ABC Organization** as a partial beneficiary or owner of a life insurance policy.

Real Estate: Real Estate may be given outright, used to fund a charitable remainder trust, or given as a life estate (see below)

Life Estate Agreements: In a life estate agreement, the donor transfers the title of his or her real property to **ABC Organization**. In return, the donor reserves the right to use the property throughout the donor's lifetime. Upon the death of the donor, the property becomes an asset of **ABC Organization**.

By planning legacy gifts, you may be able to increase income from investment assets, while receiving the satisfaction of making a very meaningful gift to **ABC Organization**.

If you would like to discuss these options or make a planned gift to **ABC Organization**, please contact Jane Doe via email xxx@xxx or phone at xxx-xxx-xxxx.