

## Legacy Gifts Explained

### HOW IT WORKS: BEQUEST

Donor



Name the people and places you wish to care for

Bequest in the Will or Trust



After your lifetime, your estate goes to the people and places you choose

Your Gift



Your Heirs

**Benefit to Donor:**  
• Estate tax savings

### HOW IT WORKS: CHARITABLE GIFT ANNUITY

Donor



Consult your financial team for advice

Charitable Gift Annuity



You get a fixed income and we receive the remainder in the future

Your Gift



Fixed Income

**Benefit to Donor:**  
May be eligible for a tax deduction  
No capital gains on appreciated assets

### HOW IT WORKS: CHARITABLE LEAD TRUST

Donor



Consult your financial team

Charitable Lead Trust



We receive fixed yearly payments, remainder to family

Your Gift



Your Heirs

**Benefit to Donor:**  
• May be eligible for a tax deduction  
• No capital gains on appreciated assets

## HOW IT WORKS: CHARITABLE REMAINDER TRUST

Donor

Charitable Remainder Trust

Your Gift



Set up trust and trustee, transfer assets



After your lifetime, trust assets transfer to power our mission



**Benefit to Donor:**

- Receive variable or fixed income
- May be eligible for tax benefits

## HOW IT WORKS: POOLED INCOME FUND

Donor

Bequest in the Will or Trust

Your Gift



Contribute cash or securities



The remainder powers our mission



**Benefit to Donor:**

- May be eligible for a tax deduction
- No capital gains on appreciated assets

## HOW IT WORKS: ENDOWED GIFTS

Donor

Establish Your Fund

Income Every Year



Irrevocable transfer  
of cash or securities



Endowment grows  
and powers our mission



**Benefit to Donor:**

- May be eligible for a tax deduction
- No capital gains on appreciated assets

## HOW IT WORKS: GIFTS OF LIFE INSURANCE

Donor

Insurance Policy

Your Gift



Name us as owner  
and beneficiary



Policy proceeds powers  
our mission now or later



**Benefit to Donor:**

- May be eligible for a tax deduction

## HOW IT WORKS: GIVING A RETIREMENT PLAN

Donor



Consult with your  
financial/legal  
adviser(s)

Retirement



Contact plan  
administrator to  
complete beneficiary  
designation form

Your Gift



After your lifetime,  
your retirement plan  
will transfer here to  
power our mission

