



LEAVING A LEGACY:

Planting a Seed for the Future

You can extend your support of Family Giving Tree and make an impact that will last well into the future.

Whether you want to put your donation to work today or extend your impact beyond your lifetime, start here to find which plan options benefit you and the causes you care about. A gift through your estate plan makes you a donor whose visionary foresight is foundational for the future of Family Giving Tree's impact in the Bay Area.



Gifts that cost nothing during your lifetime.

Make a bequest from your estate:

A bequest is a gift from your estate- a transfer of cash, securities, or property - made through your estate plans. It costs nothing now and allows you to contribute to The Family Giving Tree in the future.

How it works:

- Include a bequest to The Family Giving Tree in your will or trust.
- Indicate a specific amount, a percentage of your estate, or a portion of the remaining balance in your estate or trust
- Make the bequest unrestricted for maximum impact for The Family Giving Tree.

Benefits

- You control your assets during your lifetime
- You can modify the bequest to address any changes
- Under current tax law, the estate tax deduction for your charitable bequests has no upper limit.

Is this right for me?

Do you:

- Want to help secure The Family Giving Tree's future impact in the community?
- Want the flexibility of a gift commitment that doesn't affect your current cash flow?

Ready to start?

Begin by reaching out to your current attorney to help outline, gather, and bequest your assets in either a last will and testament or a revocable living trust. The Family Giving Tree is not a licensed attorney or estate planner. You can also access free online tools such as FreeWill to help make the process fast and simple.

Sample Language:

I hereby give, devise and bequeath to The Family Giving Tree, 606 Valley Way, Milpitas, CA, 95035, FEIN 77-0284682, [For example, "the sum of \$_____" or "_____% of my estate" or "the following stocks and bonds ____" or "specific items of property" or "the rest, residue, and remainder of my estate."]



Gifts from Your Retirement Plan



A retirement plan gift can be a tax-efficient and simple way of including The Family Giving Tree in your estate planning.

- Consult with your financial/legal advisor(s)
- Contact your plan administrator to complete the beneficiary designation form
- After your lifetime, your retirement plan will transfer to Family Giving Tree to support our work in the Bay Area

How it works:

- Name The Family Giving Tree as a beneficiary of your IRA, 401(k), or other qualified plan.
- Designate us to receive all or a portion of the balance of your plan through your plan administrator.
- After your lifetime, the balance of your plan passes to Family Giving Tree tax-free.

Benefits

- Avoid the double taxation your retirement savings would incur if you designated your heir(s) as beneficiary(ies).
- Continue to take regular lifetime withdrawals.
- You can revoke us as beneficiaries if your family's needs change.

Qualified Charitable Distribution

Are you 70.5 or older?

Family Giving Tree is happy to share a way for our supporters 70.5 or older to make tax-free gifts from your IRA called a Qualified Charitable Distribution (QCD). It's a tax-savvy way to support FGT directly from your IRA while fulfilling your Required Minimum Distribution.

*Family Giving Tree is not a legal or financial institution.
Please contact your advisors for your specific details.*



Gifts Anyone Can Make



You can support causes you are passionate about with gifts that don't impact the way you live today by either designating your favorite charity to receive estate assets in the future or by making immediate gifts of assets that are "out of sight, out of mind."

Designate and donate

Ask your bank, investment firm, or life insurance for a beneficiary designation form to **designate and donate**.

- Stocks & Investments
- Life Insurance
- Bank Accounts



Designate Family Giving Tree as a Beneficiary of Your Donor-Advised Fund

A **donor-advised fund (DAF)** is a charitable investment account created to support charitable organizations that are meaningful to you.

While you may have legacy intentions with your DAF, execution of those intentions is best secured with a succession plan.

How it works:

- You can ask your fund administrator for a beneficiary form.
- Name The Family Giving Tree as the beneficiary of the entire account or a percentage of the fund.
- After your lifetime, the remaining funds pass to The Family Giving Tree to support our mission.

Benefits:

- Continue to maximize the tax advantage of making a gift to a donor-advised fund.
- Recommend grants on an ongoing basis.
- Option to revoke the beneficiary if your charitable goals change.



Family Giving Tree™

Learn More

Thank you so much for your support! Please don't hesitate to reach out with any questions or if we can provide more information.

➤ Contact

Amelia Capsuto, *Individual Giving Officer*
amelia@familygivingtree.org

(408) 946-3111

www.fgt.org/legacy

