# WHAT WILL YOUR LEGACY BE?



"By thinking in advance about the ways we want assets distributed when we die, we take the burden away from loved ones in the future. It's a very real way for us to feel like we're tangibly supporting things we believe in."

Carolyn and Peter Goerner



### Plan now. You CAN make a difference.

#### YOU CAN MAKE A LEGACY GIFT. You don't

have to have extraordinary wealth to make a planned gift. Even a small amount can have a **big impact** over time.

#### **GETTING STARTED**

We encourage you to visit a professional advisor when determining your Will and estate plan. A legacy gift offers a tax advantage to you now for a planned charitable gift later and costs nothing now.

Compile a list of assets Consider your dreams Include family and philanthropy Some people think they must choose

between leaving a gift to their family or charity. **You** can do both!

Many planned gifts actually save your family money.

#### HOW TO MAKE A GIFT IN YOUR WILL

Our legal name and the proper beneficiary for your gift:

Johnson County Community Foundation P.O. Box 217 | 398 S. Main St. Franklin, IN 46131

#### LEGACY SOCIETY MEMBERS RECEIVE:

- Recognition in JCCF's annual report
- Invitation to the annual donor appreciation event
- Annual subscription to JCCF newsletters

It's easy. A simple designation can bring incredible support to the causes and organizations that matter to you.



#### WAYS TO GIVE INCLUDE:

- Bequest/Will
- Charitable Remainder Trust
- Charitable Lead Trust
- Charitable Gift Annuities
- Retirement Funds
- Life Insurance
- Real Estate/Property

Complete the form below to join our Legacy Society today.

Your contribution is tax deductible to the fullest

\_\_\_ DATE \_\_\_\_\_

\_\_\_\_\_STATE\_\_\_\_\_



#### CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER

P.O. Box 217 | 398 South Main Street | Franklin, IN 46131 | www.jccf.org | 317-738-2213 f 💟 🎯 extent allowed by law. JCCF is a 501(c)(3) organization.

□ I/WE WISH TO JOIN THE LEGACY SOCIETY

and be listed for membership as follows:

I/we wish to consider a deferred gift to JCCF and would like
to discuss our options with a JCCF staff member.

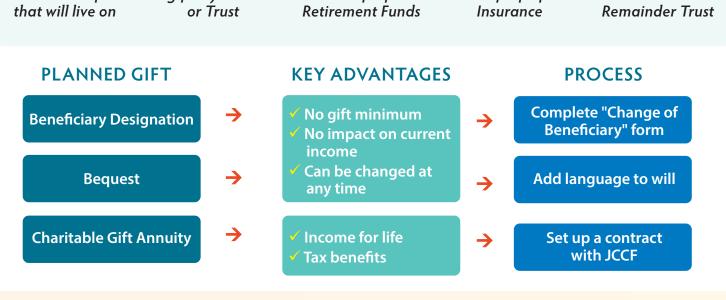
Society but prefer anonymity.		
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ohnson County Community rough:		MONTH/DAY OF BIRT
	PHONE	
	EMAIL	
	This statement of intent is non-binding.	

I/we wish to join the Legacy Society but prefer anonymit
Please contact me about other giving options.

**I/WE HAVE INCLUDED** the Johnson County Community Foundation in my estate plan through:

- □ My will
- □ A trust
- □ Life Insurance
- □ My retirement account
- □ Other

# MOST POPULAR PLANNED GIFTS



A Gift of

#### SAMPLE BEQUEST LANGUAGE

PERCENTAGE OF ESTATE FOR UNRESTRICTED PURPOSES

A Charitable fund

I give, devise, and bequeath to the Johnson County Community Foundation (JCCF), a nonprofit organization located in Franklin, Indiana, or its successor in interest, \_\_\_\_\_% of the rest, residue, and remainder of my estate as an unrestricted gift to be used for the general purposes of the JCCF.

I instruct that all my charitable gifts shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code.

SPECIFIC AMOUNT FOR UNRESTRICTED PURPOSES

I give, devise, and bequeath the Johnson County Community Foundation (JCCF), a nonprofit organization located in Franklin, Indiana, or its successor in interest, \$\_\_\_\_\_as an unrestricted gift to be used for the general purposes of JCCF.

A Gift of Life

A Charitable

I instruct that all my charitable gifts shall be made, to the extent possible, from property that constitutes "income in respect of a decedent" as that term is defined in the Internal Revenue Code.

This is not professional legal or tax advice. Consult your legal and tax advisors regarding your specific situation.

A gift in your Will

The Johnson County Community Foundation is a 501(c)(3) charitable and educational organization. Contributions to JCCF are tax-deductible to the extent provided by law.

## The things you do for others remain as your legacy.