

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



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



Your contribution is tax deductible to the fullest extent allowed by law. JCCF is a 501(c)(3) organization.

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.



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.

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



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.

- 1 Compile a list of assets
- 2 Consider your dreams
- 3 Include family and philanthropy

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

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.



I/WE WISH TO JOIN THE LEGACY SOCIETY

and be listed for membership as follows:

I/we wish to join the Legacy Society but prefer anonymity.

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

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

SIGNATURE _____ DATE _____

NAME _____

ADDRESS _____

CITY _____ STATE _____

ZIP _____ MONTH/DAY OF BIRTH _____

PHONE _____

EMAIL _____

This statement of intent is non-binding.

MOST POPULAR PLANNED GIFTS



*A Charitable fund
that will live on*



*A gift in your Will
or Trust*



*A Gift of
Retirement Funds*



*A Gift of Life
Insurance*



*A Charitable
Remainder Trust*

PLANNED GIFT

Beneficiary Designation →

Bequest →

Charitable Gift Annuity →

KEY ADVANTAGES

- ✓ No gift minimum
- ✓ No impact on current income
- ✓ Can be changed at any time

- ✓ Income for life
- ✓ Tax benefits

PROCESS

Complete "Change of Beneficiary" form

Add language to will

Set up a contract with JCCF

SAMPLE BEQUEST LANGUAGE

PERCENTAGE OF ESTATE FOR UNRESTRICTED PURPOSES

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.

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.

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.