

PLANNED GIVING



CONTROL your assets now and in the future.
TAKE CARE of family needs.
PROVIDE inheritances for your heirs at a lower tax cost.
REDUCE your income tax and even avoid capital gains taxes.
ENSURE that ElderHelp will be here for future generations.
CREATE THE LEGACY you wish.

For those who believe in continuing ElderHelp's mission, there are many ways to create your legacy. **Consider these simple ways to create a lasting gift:**



In your will: name ElderHelp as a beneficiary in your will with a specific sum, a percentage of your estate or the residual of your estate.



Charitable Gift Annuity: make a gift of your home to ElderHelp while receiving a monthly fixed income for life and a tax deduction.



As a beneficiary: you can designate ElderHelp as a beneficiary of your life insurance policy, IRA, or 401k fund.

You can be anonymous or be recognized as an ElderHelp Legacy Partner. For assistance and to let us know about your plans, complete the enclosed form or contact Director of Philanthropy Sarah Benson at 619-241-8563 or sbenson@elderhelpofsandiego.org.

ELDERHELP LEGACY PARTNER – NOTIFICATION FORM

This document is intended to assist the ElderHelp of San Diego's philanthropy team in carrying out your wishes. This is a notification and is not a legally binding commitment.

LEGACY PARTNER – YOUR INFORMATION

Donor Name: _____ Date of Birth: ____/____/____

Donor Name: _____ Date of Birth: ____/____/____

Address: _____

Phone: _____ Email: _____

LEGACY GIFT INTENTION

- ☐ I/we are pleased to share that my/our current estate planning tool(s) identifies *ElderHelp of San Diego* as a beneficiary of my/our estate.
- ☐ I/we intend to support ElderHelp's mission using the following deferred gift options:
- | | |
|---|--|
| ☐ Will Bequest | ☐ Charitable Gift Annuity |
| ☐ Trust | ☐ IRA or Retirement Plan |
| ☐ Charitable Remainder Trust | beneficiary designation |
| ☐ Life Insurance Policy | ☐ Real Estate |
| ☐ Other: _____ | |

The approximate dollar amount of our gift is (optional, but helps ElderHelp with future planning): \$_____ /The sum is expressed as _____% of my estate.

We wish to understand the “why” behind your legacy gift. If you don't mind, please share with us the reason you want to make such a meaningful gift to ElderHelp:

If you are comfortable, it is helpful to ElderHelp to have in our confidential files a copy of the will, trust agreement, or other documents – a single excerpt or paragraph.

- ☐ I have enclosed a copy of the document or section that describes my future gift.

FINANCIAL ADVISOR CONTACT INFORMATION

Attorney/Advisor Name: _____ Phone: _____

Firm's Name: _____ Email: _____

Address: _____

RECOGNITION

- ☐ I/we permit ElderHelp to acknowledge my/our commitment as a *Legacy Partner*, although the terms of this gift shall remain confidential to the extent provided by law.

In recognition of the gift, I/we would like my/our name(s) listed as:

- ☐ I/we prefer this gift to remain anonymous.

Signature _____ Date: _____

Signature _____ Date: _____

We are so grateful for your commitment to support ElderHelp with a Legacy Gift. Please contact us at development@elderhelpofsandiego.org or 619-241-8563 should you have any questions.

Best regards,



Deborah Martin
CEO/Executive Director



Sarah Benson
Director of Philanthropy

OFFICE USE ONLY

Received by:

Date:

Code: