

they have an effective impact on their constituency and they use their available resources efficiently.

Generally speaking, a planned gift does not just get applied to the general operating budget of an organization, but it is directed to an endowment fund with a specific mission for the proceeds of that endowment. Policies are in place that protect the principal of the fund, ensuring its existence in perpetuity. This means that when you plan a gift of this nature you really are leaving a legacy for future generations.

**You can obtain a copy of the free booklet, *Making a Planned Gift*, by completing the form below.**

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

## WHAT DOES PLANNED GIVING MEAN?



**I**f you are of a certain age, you probably know a lot about planned gifts. Surely your college, local hospital, charitable organizations you have supported, and possibly even your church have contacted you to extol the benefits of making a life-income gift such as a charitable gift annuity or charitable remainder trust.

Yes, you can receive income for the rest of your life and realize income tax benefits. But what exactly does planned giving mean?

Planned giving describes charitable giving that takes place in the future. It is a method of giving, and takes its place alongside other methods, normally annual or capital giving. Planned giving is the “how” of giving.

But planned giving is not just about how you do it, it’s about why you do it and what it means to both you and your beneficiary. When you plan a gift of this sort, you are making a statement. A statement that you believe the organization you are planning a gift for is important. That the work they do is meaningful to you. Not only do you see the value in supporting the future of that work, but also you trust that the organization will continue to do that work well. This means

