

What Legacy Will You Leave?



Provide for Family
and Support the
Causes that Matter
Most to You



Passions made permanent.

Have you thought about how you would like to be remembered? If you have, perhaps your thoughts have centered on ways you can leave an enduring legacy that reflects how you helped others and the good that you achieved during life. A charitable bequest is one of the easiest ways to help our cause and make a strong legacy statement.

Legacy Giving Strategies

Did you know there are several different ways to leave a legacy gift to support the causes you care about? Here are some ways to include a charitable gift in your estate plan:

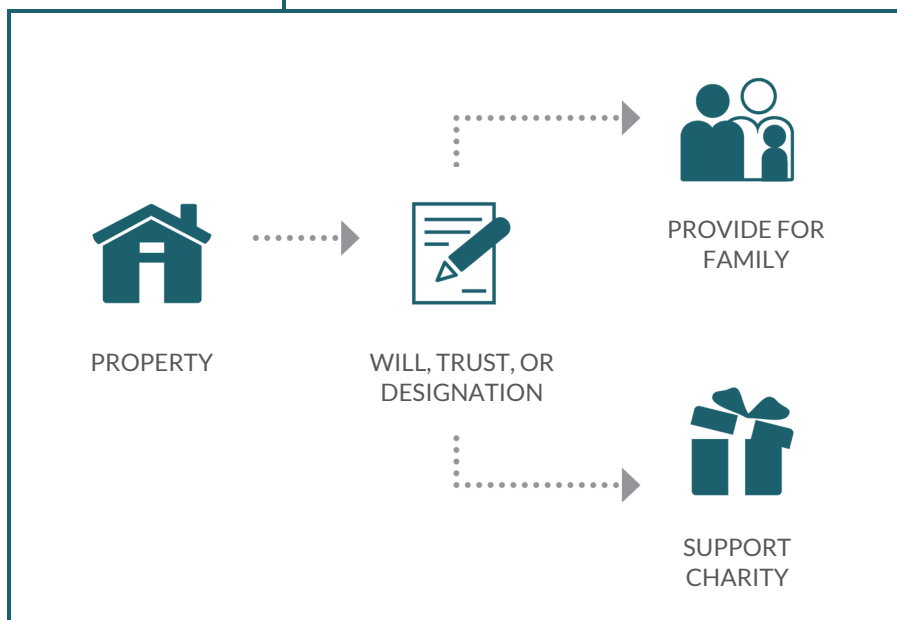
- **Will, Trust or Codicil** You can leave a charitable bequest in your will, trust or codicil. Your gift can be any dollar amount, a specific asset (such as real estate, a vehicle or a work of art), a percentage of your estate or the residue of your estate.
- **Beneficiary Designation** You can use a beneficiary designation to leave a legacy gift. You can designate us as a beneficiary of a retirement plan, a financial account or a life insurance policy.
- **Testamentary Planned Gift** You can even create a testamentary planned gift. You can fund a testamentary gift annuity or charitable trust to provide for family and support the causes you care about. Retirement assets are particularly good assets to use to achieve the best tax outcome with a testamentary planned gift.

The right plan for you depends on your personal situation and your goals. To put your goals into effect, you need to develop your plan for leaving a legacy.

How a Charitable Bequest Benefits You

In addition to helping you create your legacy, a charitable bequest may benefit you and your family in several ways. Bequests are flexible, can help you set priorities and are easy to manage.

- **Priorities** With a bequest, you can establish a priority as to who will inherit specific assets. If the primary beneficiary, such as a relative, is unable or unwilling to inherit the asset, you can name us as a contingent beneficiary.
- **Easy to Manage** With a bequest, such as a gift made as part of a beneficiary designation, you can easily manage changes to your plan. For example, many IRA administrators permit IRA owners to make beneficiary changes through their online accounts.
- **Tax Savings** With a bequest, you may even be able to reduce taxes on your heirs. If you give your high tax assets (such as your IRA) to us, you can leave your low or no tax assets (like a home or stock) to your family.



Definitions

Scholarship Funds:

You can set up a Fund to help deserving students achieve their goals of getting an education. NBCF manages many Scholarship Funds and would be thrilled to assist you in helping even more students.

Field of Interest funds:

What are you passionate about? What specific areas are you concerned about supporting? We can help you set up a Field of Interest Fund that can make perpetual gifts to specific fields of interest that you designate, even after you are gone.

Designated Funds:

Would you like to set up perpetual funding for your favorite nonprofit? Are you worried that the support that you give your favorite nonprofit will suffer once you are gone? Setting up an endowment fund, or adding to an existing Designated Fund can ensure that your passions are made permanent!



May We Help You?

There are numerous ways to structure a legacy gift depending on your unique personal situation. We can help you create a strategy to achieve your goals while supporting our mission. Please contact us to learn more.

New Braunfels Community Foundation
801 W. San Antonio
New Braunfels, TX 78130
830-606-9536
brit@nbcommunityfoundation.org
nbcommunityfoundation.org

