

How do you give to the Legacy Endowment Fund?

You may want to name the Endowment in your will or Estate Plan. You can use a codicil if you want to add it to an existing will or Estate Plan, or if you want to make a change, allowing flexibility if circumstances change in the future. A codicil is a supplementary document that may serve to amend rather than replace a previously executed will or trust.

Cash is the easiest way to give. You can make an outright gift by cash, check or money order.

You can also use a POD or paid on death account at your bank or on CDs. You still remain in control until your death.

Other ways to contribute include a gift of securities, stocks, bonds or mutual funds.

A charitable gift annuity, a charitable remainder trust, or a donor advised fund may be appropriate for some members.

You can designate memorial gifts or an endowed gift.

Another easy way to contribute to the Legacy Endowment Fund is to update your beneficiary designation on your IRA, 401K, life insurance or personally owned annuity. You can use a beneficiary update form from your investment provider to designate all or a portion/percentage that would be paid out to the Legacy Endowment at your death.

If you are over 70 ½ and have a retirement account, you can utilize a qualified charitable donation directly from the account. The QCD cannot exceed \$100,000 per year.