

# Endowing Your Legacy



It is Easier  
Than You  
Might Think



## How Can an Endowment Gift Benefit You?

When you make a gift to an endowment, you can do good for children and families, and you can benefit in numerous ways:

- You may be entitled to take a charitable income deduction for a gift made today.
- You can help make sure that your support for children and families continues.
- You can create an endowment in your name, or honor and memorialize a loved one.
- You can leave a legacy that will inspire others.

*Would you like to leave your foot print with the causes that matter most to you? Consider an endowment gift. When you establish an endowment fund, your gift will continue to support children, families and your community, for generations to come.*



## How Will Your Endowment Work?

The purpose your endowment fund is to financially sustain the services provided to children and families, over the long run.

The principal of your gift is kept intact. Part of the annual earnings are used to fund the needs of your choosing and the remainder goes back to grow the endowment.

*It is easier than you may have imagined to make a significant contribution to an endowment fund.*

## How Can You Make an Endowment Gift?

**Gift of an Asset**, such as cash, stock, real estate, business interests, collectables, etc.

**Gift in your will or trust.** Bequests can be a dollar amount, asset or percent of your estate.

**Beneficiary Designation Gift** of assets when you no longer need them, such as:

1. Checking, savings and/or mutual fund accounts
2. Retirement accounts, such as an IRA, 401(k) or 403(b)
3. Life insurance policy or Commercial annuity

**Charitable Life Estate**, which is a remainder gift of your home or vacation home. You continue to live in and use them.

**Income for Life**, such as a charitable gift annuity or charitable remainder trust. These plans enable you to make a future gift to endow our work while enhancing your current financial security.

## Is an Endowment Gift Right for You?

If you would like to leave a legacy gift that ensures children will receive support long after you are gone, an endowment gift is worth considering.

# Definitions

## Endowment

A fund established with Children's Home Society of Florida Foundation, Inc. (CHSF) in which gifts to the fund are invested. Part of the income supports our services and part goes back to grow the fund. Gifts to an endowment benefit children and families far into the future.

## Beneficiary Designation

Leaving a financial account, retirement account, or insurance policy to another person, trust or to Children's Home Society of Florida using a simple form, typically provided by a financial service or insurance company. The beneficiary can be one or more individuals and/or organizations, such as a trust or CHS.

## Charitable Income Plans

Giving plans where you can make a gift of an asset and in return receive income. Upon your passing, the remainder is distributed to one or more charities.



## How Can We Help You?

For more options on how you can endow the future of children and families and to see how others are doing this, please contact us. Your endowment can bring you joy while creating an impact on the future of your community.

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