

What is Planned Giving?

Planned gifts allow you to make significant contributions to Family Services or other organizations whose causes you care about deeply. Planned gifts create a sustainable future for the organization and assure that we are able to Protect, Heal, and Care for children, families, and individuals for generations to come.

Ways to Give

Beneficiary Designations	Bequests- Wills or Trusts	IRA Charitable Rollover	Charitable Remainder Trusts	Charitable Lead Trusts
You may choose to designate Family Services as a partial or full beneficiary of your retirement assets or life insurance policy. This is one of the easiest ways to give to a charity. You have the flexibility to change your designated beneficiaries at any time by contacting your insurance carrier or plan administrator and simply filling out a form.	One of the simplest ways to provide a lasting gift to Family Services is through your will or trust. By including Family Services in your estate plans, you can specify a percentage or dollar amount of your assets to come to us after your lifetime. Assets designated to Family Services reduce the estate taxes payable for your family.	Starting at age 70 ½, you can give an amount per a year from your IRA directly to a charity such as Family Services. You do not pay income taxes on the gift, and since the gift does not count as income it can help reduce your annual income level. This may provide you with significant tax benefits.	With a charitable remainder trust, assets are transferred into a trust for a designated number of years (or for the duration of your life). Regular payments are made to you or another beneficiary for those years, and then the remaining assets are paid to Family Services.	This is a flexible plan in which assets are transferred to a trust that pays income to one or more charitable recipients. At a fixed date or at the time of death, the assets are transferred to others named by the donor.

What You Can Give

- Gifts of Stock and Bonds
- Retirement Assets (IRA, 401k, 403b, pension, or other tax deferred plans)
- Cash
- Life Insurance Policies

Legacy Society Benefits

- Tax benefits for you and your family
- Appreciation Gift
- Special Recognition in our Impact Report
- Exclusive benefits at our Annual Green & Gold Gala, including open bar for you and your guest
- Exclusive updates from our President and CEO
- Legacy Society Pin to proudly wear at special events

Ready to Join?

For more information on planned giving and providing for the future of Family Services, please contact Kayla Beyersdorf, Donor Engagement Specialist, at kbeyersdorf@familyservicesnew.org or 920-436-64360 ext. 1281