

Lifespan's Circle of Life Society

Join Lifespan's Circle of Life Society today.

Unless otherwise specified, planned gifts received by Lifespan are invested, and the interest accrued is used to support advocacy efforts and emergency program needs. The invested principal ensures older adults will always find the help they need at Lifespan.

Please join us.

Planned gifts should be directed to:
Lifespan of Greater Rochester
Development Fund Inc.
Tax ID: 16-1403060

Complete a **Declaration of Intent:**
www.lifespanrochester.org/donate-now

Questions?

Call Lifespan's Director of Development,
Diana Palotas at 585-287-6382,
or email
dpalotas@lifespanrochester.org.



Lifespan of Greater Rochester, Inc.
1900 S. Clinton Avenue
Rochester, New York 14618

*Your planned gift
will ensure older adults can
always find the help they need
at Lifespan.*

This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice.



Lifespan's Circle of Life ensures that older adults **always** have the help they need to "take on" longer life.

Many planned giving options can even help you today!

Gift options that can help reduce or defer your income taxes include retirement plan gift, gift in will, beneficiary designation, personal property, real estate or charitable remainder trust.

Gift options that can reduce or eliminate capital gains tax include real estate, stock, mutual funds, gifts in will, beneficiary designation, charitable remainder trust.

Gifts options that can lower your estate taxes include life insurance plan, real estate, gift in will, beneficiary designation, charitable remainder trust.

I am deeply committed to supporting Lifespan to help keep older adults safe at home, for as long as possible. By volunteering on a regular basis and donating annually, I am confident I am helping achieve this goal. Lifespan is also a beneficiary of my will. This is a significant way to ensure a lasting legacy and enable Lifespan to carry forward this important mission.

LAURA H.



TYPES OF PLANNED GIVING

Retirement Plan Gift – Retirement assets are among the most heavily taxed and they are an ideal resource for charitable giving once you no longer need the assets for yourself. Naming Lifespan as a beneficiary for your IRA or other retirement accounts will reduce your family's tax on those assets.

Gift in Will – You can name Lifespan in your will or trust, designating the gift of your choice (for example, cash, real estate, personal property or securities), which could save you income, capital gains and estate taxes.

Beneficiary Designation – You can simply request a change-of-beneficiary form from the company holding your assets and include Lifespan as a beneficiary, reducing your income taxes and possibly estate taxes.

Life Insurance Plan – Adding Lifespan as a beneficiary of your life insurance policy is an easy way to make gifts outside of the estate process.

Charitable Remainder Trust – This gift can provide you or a loved one with life-time income, while reducing your capital gains, income tax and potentially estate taxes.

Real Estate – Transferring real estate to Lifespan will allow you to deduct the appraised value of the property from your income tax and may help you avoid capital gains tax.

Stock Market and Mutual Funds – Donating appreciated stock or mutual funds will help you avoid capital gains and you may be eligible for an income tax deduction on the full market value.