

# Ways to Make a Planned Gift at Fairfield County's Community Foundation



Planned gifts offer many benefits, and Fairfield County's Community Foundation is here to help. You can fulfill your charitable goals in many ways including providing unrestricted support for our community impact work. You can also add to an existing fund or create a new fund to benefit a different nonprofit.

And you can give the next generation of your family an opportunity to continue your tradition of philanthropy:

- With no immediate cost to you, planned gifts can perpetuate your charitable giving for years to come. In fact, with a planned gift, you may be able to make a larger gift than you thought was possible during your lifetime.
- Valuable tax benefits can be realized, while also fulfilling your intentions to address the needs of Fairfield County for years to come.

Description	Benefits
<p><b>Bequest</b> Make a charitable gift in your will or revocable trust.</p>	<ul style="list-style-type: none"> <li>• This can be a dollar amount, marketable securities, or real/personal property.</li> </ul>
<p><b>Charitable Remainder Trust</b> Make a charitable gift by an irrevocable transfer of assets to a trust. You and/or others receive income for life or a number of years. At the end, the remaining assets pass to Fairfield County's Community Foundation.</p>	<ul style="list-style-type: none"> <li>• You and/or others retain an income stream that can be fixed or variable based on the performance of the trust portfolio.</li> </ul>
<p><b>Charitable Lead Trust</b> Make a charitable gift by an irrevocable transfer of assets to a trust. Fairfield County's Community Foundation receives income for a specified period of time. The remaining assets pass to your heirs.</p>	<ul style="list-style-type: none"> <li>• You can pass assets to your heirs at a reduced cost.</li> </ul>
<p><b>Retirement Plan Gift</b> Make a charitable gift of a qualified retirement plan after your lifetime.</p>	<ul style="list-style-type: none"> <li>• You continue to take regular lifetime withdrawals.</li> <li>• Easy to implement without an attorney.</li> <li>• Avoid potential double taxation of retirement assets.</li> </ul>
<p><b>Life Insurance Gift</b> Make a charitable gift of a paid-up life insurance policy.</p>	<ul style="list-style-type: none"> <li>• Give generously using an asset your family no longer needs.</li> <li>• Easy to implement without an attorney.</li> </ul>

In addition, ask for our Future Society brochure which provides valuable worksheets to help you formulate your charitable objectives and determine the most appropriate planned giving vehicle to match your needs. Bequest language and specific instructions for other types of planned gifts are also in the brochure.

# The Future Society



## Joining the Future Society is Easy

The Future Society is a visionary group of like-minded philanthropists who are creating lasting community impact through bequests and beneficiary designations to Fairfield County's Community Foundation.

Tell us that you have made a bequest in your will or trust (of cash, securities or other assets) to Fairfield County's Community Foundation or one of our funds. Or tell us you have named Fairfield County's Community Foundation as beneficiary of your retirement account annuity or insurance policy.

### As a Future Society member you will:

**Discover ways to make an impact.** Deeply engage with our staff and partners to explore important trends, policies and the developments impacting Fairfield County's communities.

**Inspire others with your story.** By being recognized for your planned gift, you can inspire others to follow in your footsteps. With your permission, we will share your name in our annual report and other materials.

**Be our special guest at events.** As a member of the Future Society, you will receive invitations to exclusive philanthropic events with fellow donors who share your vision, compassion and interests.

**Achieve your philanthropic goals.** Through a close relationship with you and our network of experienced professional advisors, we can help to ensure that your financial planning meets your philanthropic vision and goals.

We would be honored to talk with you and your financial and legal advisors about easy, proven ways you can make an enduring impact through a planned gift.

*"Planned gifts are a powerful way to support our community in perpetuity while meeting personal, financial and philanthropic goals. If you too share our dream of Fairfield County as a place where every one of our citizens has the opportunity to thrive – today, tomorrow and forever – we warmly invite you to join us in becoming a member of the Future Society."*

Charlotte & John Suhler  
Co-Chairs,  
Future Society

*To learn more about fund types and fee structures, Mike Rosen, Chief Revenue and Business Development Officer, at 203.750.3242 or MRosen@FCCFoundation.org.*