



PHILANTHROPIC GIFT-PLANNING OPTIONS

Bequests

Gifts from a will or trust. All it takes is some simple language in your will or trust to reflect your wishes.

Beneficiary Designations

Designate Beverly Bootstraps as a beneficiary of a life insurance policy, IRA, or retirement account. It's easy to do on your own, just edit your beneficiary form to include Beverly Bootstraps at the amount or percentage of your choice. Proceeds can be made available at the death of an individual and/or surviving spouse.

Charitable Gift Annuities

In return for your contribution, Beverly Bootstraps will provide you with lifetime annuity payments. The older you are, the higher the annuity payment rate. This is one of the most popular planned gifts for people living on fixed incomes.

Charitable Remainder Unitrusts and Charitable Remainder Annuity Trusts

Donors who have established a charitable remainder annuity and/or unitrust may include Beverly Bootstraps as the beneficiary, or co-beneficiary. Beverly Bootstraps encourages donors to limit trusts to two beneficiaries with a trust expectancy of no more than 20 years.

Charitable Lead Trusts

Donors who have established Charitable Lead Trusts can designate Beverly Bootstraps as the beneficiary. Beverly Bootstraps will receive defined annual payments for a period of years. At the end of the period, the assets revert to the donor or are transferred to some other named party. This is an excellent way to transfer property to family members down the line (typically children and grandchildren) at a minimal cost.