

# Making a Lasting Impact: Legacy Fund

Whether you've always given to your favorite causes or you've always wanted to, supporting their work after your lifetime is as easy as filling out a form to establish your no-cost, personalized Legacy Fund.

## Getting Started Is Easy

A Legacy Fund provides lasting benefits to you, your family, and the causes you care about. Here's how it works.

### 1. ESTABLISH

#### **Complete a simple agreement to establish your free Legacy Fund, tailored to match your philanthropic goals.**

Once established, you can update the form throughout your lifetime to reflect your evolving interests at no charge.

### 2. REALIZE

**We work with you and your professional advisors to determine the best giving strategy and activate your fund after your lifetime.** Some planned gifts can provide lifelong income to your family, while others enable you to provide for charity in ways that maximize your gift or minimize the impact on your estate.

### 3. IMPACT

**Once your Legacy Fund is activated, we will carry out your wishes and ensure that — whether you've chosen to support nonprofits or open a scholarship — your generosity makes a difference.** Plus, our investment expertise will strengthen the impact of your legacy gift, for enduring impact.

Our staff handles the administrative tasks of achieving your philanthropic goals, all for a nominal support fee once your Legacy Fund is activated. We re-invest the Support Fee into the community through our grantmaking and programs, multiplying the impact of your legacy in our region.

### **Consider a Legacy Fund if you:**

- Want to ensure the causes you care about are supported in the long term through an estate gift.
- Need to preserve cash now and/or for retirement, but want to shield assets from estate taxes through a Charitable Gift Annuity or Charitable Remainder Trust.
- Want to simplify the administration of your estate for your executor or successor trustee.

Our mission is to lead, serve, and inspire enduring philanthropy for a just and vibrant Sacramento region.

The center of philanthropy in the area, we increase the effectiveness of your philanthropy, identifying and addressing our region's greatest needs, and — together — strengthening local communities. We are here to support your charitable efforts with personalized service. **To learn more, call (916) 921-7723 or visit our website at [sacregcf.org](http://sacregcf.org).**



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