

## Ensuring a Strong Future

**T**hank you for being a part of the Pacific Council. Your generous support guarantees that our next 20 years will be as strong as the 20 years now behind us. In 2015, plan a gift to the Council that reflects your long-term commitment to building the vast potential of the West Coast for impact on global issues, discourse, and policy.

By including the Pacific Council in your estate or financial plans, you help to sustain and grow the Council and enhance our ability to serve California, the United States, and the world. The many different giving methods are listed below: the correct choice for you balances what you wish to accomplish for yourself and your family with your charitable interests in your overall estate or financial plans.

## Types of Planned Gifts

### WILLS AND BEQUESTS

Having an up-to-date will or trust fund that identifies each of your beneficiaries is important: the details of your will should be reviewed regularly, especially when you experience a major life change. If you already have a will, you can modify it by talking with your legal advisor.

You can support the Pacific Council by including a bequest provision in your will or revocable trust. Adding a bequest provision only requires a simple amendment, not the entire re-drafting of your will. You may opt to specify an outright gift as a designated dollar amount or as a percentage of your estate. You can also name the Council as a remainder beneficiary to receive funds only after amounts have been paid to individual beneficiaries.

A bequest has many advantages, including:

- Your assets remain in your control during your lifetime.
- You can modify your bequest if circumstances change.
- There is no limit on estate tax deductions that can be taken for charitable bequests.

Your will is a legal document, and exact wording is essential to ensure your intent is honored. The Pacific Council recommends that you seek professional legal advice when creating or modifying your will.

### CHARITABLE GIFT ANNUITIES

The charitable gift annuity is a planned gift that pays you fixed payments based on your age. The amount of your annuity depends on the size of your gift and your age. The larger your gift and the older you are, the more you will receive and the greater your tax deduction will be. *[Continue]*



## CHARITABLE TRUSTS

There are a few kinds of charitable trusts that may be appropriate for you.

A charitable lead trust consists of annual gifts to the Pacific Council and passes the remaining principal to your selected beneficiaries. The charitable lead trust pays trust income to the Pacific Council for a period of years and may increase the gift received by your beneficiaries because of the unique tax advantages.

A charitable remainder trust benefits you now and the Pacific Council later. You can transfer cash, securities, or other appreciated property into a trust based upon the preferred type of payment:

- A Charitable Remainder Annuity Trust provides you or your designated income beneficiaries with stable, predictable payments for life or a term of years.
- A Charitable Remainder Unitrust pays a percentage of the market value of assets revalued annually to you or to beneficiaries you name.

## OTHER GIFT OPTIONS

### Gifts of Retirement Assets

You can benefit the Pacific Council simply by changing the beneficiary designation on your retirement account.

### Gifts of Securities

The IRS allows one of the most significant tax breaks for gifts of appreciated securities. You receive a charitable deduction for the full market value of the stock if owned for more than one year, and you avoid paying capital gains tax on the appreciated portion of the stock's value.



## The Pacific Council Legacy Society

Our Legacy Society honors and acknowledges those individuals who have included the Pacific Council in their estate plans. We will enroll you in the society upon receiving confirmation in writing that you have included the Council in your will or as a beneficiary in any other disposition of assets.

Your membership in the Legacy Society will demonstrate that you consider the long-term strength of the Pacific Council to be an important piece of your own legacy.

## Making a Decision

Please talk to your attorney, accountant, or other tax adviser for information on how these options fit into your unique financial circumstances. If you have already arranged for a bequest or other planned gift, we would like to recognize you for your support. We would be honored to include you as a member of the Pacific Council Legacy Society.

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