Peninsula Family Service

LEGACY PARTNERS
MEMBERSHIP CONFIRMATION

Peninsula Family Service welcomes you to Legacy Partners and treasures the opportunity to pay tribute today to those who have included the organization through various forms of strategic giving, including their estate plans. We applaud your lasting commitment to a community where opportunity, financial stability, and wellness are secured for all. To acknowledge your generous planning on our behalf, we would like to ask you for the following information. (Please note that all information is confidential.)

Name: ____

Address: ____

City: ______________________________ State: ______ Zip Code: ______________

Phone: ____________________________ Email: ______________________________

I/we have included Peninsula Family Service in my/our financial planning through a:

- ☐ Will/Revocable Trust ☐ Charitable Trust (e.g. Charitable Remainder or Lead Trust)
- ☐ Life Insurance Beneficiary (primary or contingent)
- ☐ Retirement Plan (such as IRA or 401K) Beneficiary (primary or contingent)
- ☐ Other (please specify)______________________________

Peninsula Family Service is honored to recognize Legacy Partners in donor publications and invitations to regular activities throughout the year:

- ☐ Yes, please list my/our names in donor recognition materials as follows:

  ____

- ☐ Yes, please include me in recognition activities
- ☐ I would prefer to remain anonymous

Signature(s):______________________________ Date:____________________

Optional Information: Attorney/Other Advisor: ______________________________

City:______________________________ State: ______ Zip: ______________

Phone: ____________________________ Email: ______________________________

Please call for questions, or send or email this completed information to:
Peninsula Family Service
24 Second Avenue, San Mateo, CA 94401 info@peninsulafamilyservice.org
Phone: (650) 403-4300 ext 4412 Fax: (650) 403-4303

Legacy Partners

With thoughtful planning, you can create a transformational gift for Peninsula Family Service, ensuring a bright future for our community. While we always recommend that people consult their own estate planning advisors, we have listed below a number of ways you can leave a strategic, legacy gift to Peninsula Family Service.

Bequests

A contribution to Peninsula Family Service made through a provision in your will or revocable trust. Such a gift is easy to arrange, will not alter your current giving in any way, and can easily be modified to address your changing needs.

Retirement Plans

Naming Peninsula Family Service as a beneficiary of your IRA, 401K, 403B, or other qualified retirement plan is a simple way to make an extraordinary gift that can avoid unanticipated taxes for your heirs.

Life Insurance

You can transfer ownership of a paid-up life insurance policy to Peninsula Family Service, and the organization can elect to cash in the policy now or hold onto it.

IRA Charitable Rollover

Congress has finally signed the IRA Charitable Rollover provision into law. For people who have reached age 70 ½, this is an excellent opportunity to make a gift during your lifetime from an asset that could be subject to multiple levels of taxation. Contributions of up to $100,000 per year (that would otherwise be a taxable minimum distribution) can be made directly to a charity from your financial institution.

Life Income Gifts

There are a variety of gift vehicles available to donors that can stretch your giving ability, provide an income for life, offer tax benefits, and secure a future for your heirs. There are a number of charitable trusts that offer such benefits.

Moreover, there are giving vehicles that allow you to freeze the taxable value of your appreciating assets by using them to make gifts today and pass them back to family members later.

Please contact Peninsula Family Service for additional information
(650) 403-4300 ext. 4412
info@peninsulafamilyservice.org