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Making a bequest to charity

In considering your plans for the future, you may not only be thinking about how to help your family and save on estate taxes, but also how you might benefit one or more charitable organizations. A bequest permits you to leave a lasting legacy and often provides valuable tax savings.

A charitable bequest is one of the easiest gifts to make. You can create a bequest of any dollar amount, gift-specific property, or designate a percentage of your estate in your will or trust plan. You can also make a gift of your IRA or 401(k) plan.

All inquiries are treated with complete confidentiality. This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Let us help you create your **charitable legacy.**

If you want to incorporate a charitable gift into your estate plan, the Community Foundation of Louisville can make it simple, effective, and meaningful. Whatever your charitable goals, we offer flexible options that can accommodate your interests and passions.

How does it work?

- We meet with you to identify your charitable goals.
- We create a customized fund agreement for you and keep it on file.
- Your attorney incorporates by reference the name of your fund in your estate plan documents.
- After you pass away, the fund is activated by receiving a gift from your estate and we carry out your wishes according to the fund agreement.

What are the benefits?

- You can change your charitable wishes at any time without having to change your will or estate documents.
- You can make a lasting impact for years to come.
- You can support multiple charities through just one gift.
- Your estate gift is invested and can grow over time.
- No setup costs. No fee is charged until you pass away and we receive a gift from your estate.

Contact us today to get started!

Ideas to Plan Your Charitable Legacy

No matter what your goals are, we can help! Here are a few options for how we can help you support the charitable causes and interests that matter most to you.

Do you want to pass on the value of giving back to your children and grandchildren?

You can create a Donor Advised Fund through your estate plan, and your children can advise the fund to support nonprofit organizations that they care about. Successive generations can take over advising the fund so that the value of giving back is preserved in your family for future generations.

Do you want to support specific nonprofits that you have given to during your life?

You can create a Designated Fund that names several nonprofit organizations that will each receive an annual distribution from your fund after you're gone.

Are you unsure about which organizations or causes to support?

The Fund for Louisville is our community fund that supports Louisville's most urgent needs as they evolve over time. Naming this fund in your estate document is a great option if you want to support future generations of Louisvillians and ensure that Louisville will always be a thriving city.

Do you want to support a broad charitable cause instead of naming specific organizations?

With a field of interest fund, you can specify a charitable field such as the arts, hunger relief, or education. The Foundation's Community Leadership team will then select the specific nonprofit organization to receive a distribution from your fund. You can create a new field of interest fund or support one of our existing field of interest funds.

Get started today!

Contact the Philanthropic Services Team:
502.585.4649 / stewardship@cflouisville.org

Visit cflgiftplanning.org
or scan here to learn
more.

