Securing your legacy

Presented by Ann Updegraaff Spleth
Kiwanis International Foundation
Chief Operating Officer
Planned gifts

Planned giving opportunities include:

• Bequests through a will or trust
• Life insurance policies
• Life income gifts
• Retirement plans or IRAs
• Estate gifts
Honoring your legacy

Heritage Society

• Recognizes a planned gift of US$10,000 or more.
• Recognition includes a commemorative brick.
Honoring your legacy

Mary and Bo Shafer
Legacy Society

• Recognizes a planned gift of US$50,000 or more.
Recognizing your generosity

A planned gift to the Kiwanis International Foundation makes a positive impact on children’s lives—even beyond your own. When you have completed your estate plan, please let us know so we may properly thank you. Those who commit to planned gifts of US$10,000 or more to the Kiwanis International Foundation become members of the Heritage Society. For planned gifts of US$50,000 or more, donors become members of the Mary and Bo Shafer Legacy Society. Please provide documentation of your commitment (copy of relevant page of the will, etc.) for our files.

Yes, I/we have made a commitment to The Kiwanis International Foundation in my/our estate plan.

Name(s) as you would like to appear on recognition

Address

City, state or province, country and postal code

Home, business and/or mobile telephone

Email (Optional)

Kiwanis club (Optional)
Gifts that return income

- Charitable gift annuity
- Charitable remainder unit trust
- Charitable remainder annuity trust
Gifts that help now

- Charitable lead trust
- Donor advised fund
Donor advised fund

• A permanent, endowed fund.
• An irrevocable, tax-deductible gift.
• Easy to establish, low-cost and flexible.
• Less expensive than a private foundation.

Minimum contribution is US$10,000. Funding begins at US$25,000.
Donor advised funds

Create a fund in four simple steps:

1. Complete an application/gift agreement through our foundation.
2. Name at least two advisors.
3. Describe your fund’s purpose.
4. Recommend grants.
Questions?