"Giving Beyond Your Years"

Planned Giving Opportunities

We invite you to include the Outdoor Circle in your planned giving, knowing that your gift will become a legacy, living on in perpetuity and blessing our community with beauty for generations to come.

A planned gift makes your core values known while supporting the long-term success for an organization whose work you value. You do not need to be wealthy to leave a legacy gift, and we encourage you to consult with your financial advisor to discuss making a planned gift or bequest to The Outdoor Circle.

Ways to give to The Outdoor Circle for both the present *and* future include:

BEQUESTS ~ A gift to The Outdoor circle in your Will or Trust can be a specific dollar amount, a specific asset, or a percentage of your estate.

IRA DISTRIBUTIONS ~ If you are age 70-1/2 or older, you may instruct your IRA custodian to transfer any amount up to $108,000 directly to The Outdoor Circle and avoid income tax on the amount of the gift, while supporting our mission.

RETIREMENT PLANS ~ Often overlooked by donors, you may choose to name The Outdoor Circle as a beneficiary of your retirement funds, such as IRA, 401(k), or 403(b). You may give the entire balance, a specific amount, or a percentage of the account. By naming a charity as your IRA beneficiary your estate may also receive an estate tax charitable deduction for the value of the IRA left to the charity, potentially reducing the amount of estate tax owed. Unlike individual beneficiaries, who generally have to pay income tax on inherited IRA distributions, a qualified charity does not.

LIFE INSURANCE ~ You may name The Outdoor Circle as a beneficiary of the entire policy, a specific amount, or a percentage of the policy benefit.

SECURITIES ~ If you own stocks, mutual funds, or other securities that have increased in value, and you have held them for more than one year, you can avoid capital gains tax on the sale by giving these to The Outdoor Circle and receive a charitable income tax deduction for the entire value of the gift.

LIFE INCOME AND COMPLEX GIFTS ~ Life income gifts allow you to leave a gift in the care of The Outdoor Circle, while receiving income during your lifetime. The two most popular life income gifts are Charitable Remainder Trusts and Charitable Gift Annuities. Please contact us or your financial advisor for more information.

Additional Information

- For examples of possible wording to use when making your bequest or gift, see the file: "**Sample Bequest Language**" at www.outdoorcircle.org/give-beyond-your-years.html
- To inform us of your intention to name The Outdoor Circle in your estate plans, see the file: "**Legacy Society Pledge Form**" at www.outdoorcircle.org/give-beyond-your-years.html (This is a non-binding declaration, for our records only.)
- Those who make a bequest of *any size,* or a gift of $25,000 or more, become a member of The Outdoor Circle *Legacy Society*. To learn about member benefits and recognition, see the file: "**Legacy Society Information**" at www.outdoorcircle.org/give-beyond-your-years.html
- The Outdoor Circle is a 501(c)(3) nonprofit organization. Federal tax ID: 99–0085044.

Mahalo for considering The Outdoor Circle in your current and planned giving.
More details are available online at: www.outdoorcircle.org/give-beyond-your-years.html

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