It’s an honor and a privilege when we get to help someone create an endowment at Marion Community Foundation as a lasting legacy to a life well-lived. What you may not know is that planning your philanthropic legacy with us is easy and free.

Sure, some estate plans can be complex and no one likes to ponder the inevitable, but talking with an attorney and professional advisors to create your estate plan is both necessary and easier than you might imagine. And, including Marion Community Foundation as a beneficiary to your estate plan can, in some cases, simplify matters for your heirs and provide tremendous tax savings for them.

We’ll work with you and your attorney to include the simple language necessary to start an endowment fund with us. Start by meeting with our President and CEO Dean Jacob and discuss your charitable plans. If you already have a fund with us, it is extremely easy to add a simple clause to your will or trust. If you want to start a new fund, that’s easy, too, and only requires a couple of more steps. Even easier is naming Marion Community Foundation as a beneficiary to any of your bank or investment accounts, retirement plans, or insurance policy.

Continued on Reverse
Setting up a planned gift means you don’t make a donation now, because the charitable gift only occurs after you pass. And, all of this is absolutely free to you.

That’s one of many perks a community foundation offers to people – the assistance and means to create a lasting, philanthropic legacy at no expense to you.

Schedule a time to come in by calling 740-387-9704.

Things to Consider About Planned Gifts

- **Potential Tax Benefits**
  
  Giving retirement assets like an IRA or 401k directly to charity - which is as simple as naming Marion Community Foundation as your beneficiary - simplifies things for your heirs and can save them substantially on taxes. Allow us to help you take advantage of a little-known strategy.

- **Maintain Your Lifetime Cash Flow...Maybe Even Improve It**
  
  Planned giving does not affect your cash flow because the gift is made after you die from your estate through a will or bequest or by beneficiary designation. You can set up a Charitable Gift Annuity through Marion Community Foundation to both establish your philanthropic legacy and provide an income stream for the remainder of your life. CGA rates are much higher than certificates of deposit.

- **Completely Modifiable or Revocable**
  
  Just as you can make changes to your will at any time, you can make changes to your planned giving if you need to do so.

- **Work with Your Professional Advisor**
  
  Some options for your planned giving, like POD/TOD and other beneficiary designations on life insurance, IRAs, and similar financial vehicles can be accomplished with just your signature at your bank, investment firm, or insurance agency. We can easily help you with this — while your professional advisor ensures your overall estate plan is consistent.

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ESSENTIALS
1. Will
2. Letter of Instruction
3. Trust Documents
4. Financial Power of Attorney (POA)

MARRIAGE & DIVORCE
5. Marriage License
6. Divorce Papers
7. Military Documents (DD214)

HEALTHCARE CONFIDENTIAL
8. Personal & Family Medical History
9. Durable Health-Care Power of Attorney
10. Authorization to Release Health-Care Information
11. Living Will
12. Do-Not-Resuscitate Order

PROOF OF OWNERSHIP
13. Housing, Land & Cemetery Deeds
14. Escrow Mortgage Accounts
15. Proof of Loans Made & Debts Owed
16. Vehicle Titles
17. Stock Certificates, Savings Bonds & Brokerage Accounts
18. Partnership & Corporate Operating Agreements
19. Tax Returns
20. Life Insurance Policies
21. Individual Retirement Accounts
22. 401(K) Accounts
23. Pension Documents
24. Annuity Contracts
25. List of Bank Accounts
26. List of all User Names & Passwords
27. List of Safe-Deposit Boxes

27 Estate Documents you need to put in one place