

## There are many ways to give from your estate without changing your will...

Almost any arrangement that provides for a death beneficiary can be made payable to the Fountain Hills Community Foundation Endowment Fund. Consider the following:

**Financial Accounts** People who have financial accounts at banks, savings and loan associations and credit unions generally may direct their deposits (checking, savings, share accounts, certificates of deposit) be paid on death ("POD") to a particular individual or to the Fountain Hills Community Foundation Endowment Fund. The "POD" designation can be revoked at any time prior to death and in no way affects the depositor's control over the funds in the account. Please consult the manager of your financial institution for more details.

**Brokerage Accounts** If you have stocks, bonds or mutual fund shares in brokerage accounts, it is possible to name the Fountain Hills Community Foundation Endowment Fund as a transfer on death ("TOD") beneficiary. You would maintain full control over the account during lifetime.

**Life Insurance** One of the easiest and most cost effective ways to include the Fountain Hills Community Foundation Endowment Fund in your estate plan is through life insurance. You have the option of making the Fountain Hills Community Foundation Endowment Fund the beneficiary or alternate beneficiary of an old policy that is no longer needed for family security. Simply ask your insurance company for the forms necessary to change the beneficiary or transfer ownership to the Endowment Fund.

**Retirement Accounts** It is easy to leave your IRA or other retirement account to the Fountain Hills Community Foundation Endowment Fund. Just call the custodian of your account and ask for a new beneficiary form. Leaving all or part of your retirement account to the Foundation may avoid both income taxes and "death taxes."



## Other ways to leave a legacy...

Make a bequest to the Fountain Hills Community Foundation Endowment Fund.

Structure a bequest to the Endowment Fund through your estate plan - using a will or living trust. Bequests can be established in such a way that will be both personally satisfying and advantageous from a tax perspective.

Charitable bequests take many forms:

**Outright (specific) Bequests** This is a gift of a particular amount or item of property. For example: "I bequeath \$25,000 to the Fountain Hills Community Foundation Endowment Fund."

**Residuary Bequests** The residue of an estate is the amount remaining after all specific bequests have been distributed; the exact amount will not be known until the final accounting is completed. The residue may pass as a percentage bequest. For example: "I give the residue of my estate to the Fountain Hills Community Foundation Endowment Fund."

**Contingent Bequests** You can name a secondary beneficiary to receive property in the event the primary beneficiary is not alive. For example: "I bequeath \$25,000 to my brother, but if he has predeceased me, I direct the \$25,000 be paid to the Fountain Hills Community Foundation Endowment Fund."



## Make a contribution today...

Many of our friends and neighbors find it satisfying to continue their lifetime support of Fountain Hills so we can continue to improve the quality of life in our community. As a result, many of our residents have a desire to leave a living legacy to enrich the life experiences of future generations in our community.

With this need in mind, the Fountain Hills Community Foundation Endowment Fund has been created to ensure permanent support for those non-profit, 501(c)(3) local charities in need.

By making a contribution to the Fountain Hills Community Foundation Endowment Fund, your gift will provide financial support to needy hometown organizations. As a donor, you may annually select the charities that will benefit from your gift.

Endowment funds are invested and managed by the Arizona Community Foundation which manages nearly \$1 billion in assets. The income from these investments is then directed by the Foundation to local charities in the Fountain Hills area.

The Fountain Hills Community Foundation Endowment Fund offers you the opportunity to:

- Leave a living legacy
- Ease or eliminate capital gains taxes
- Minimize estate and gift taxes
- Receive an income stream for life
- Support the charity, or charities, of your choice

The Fountain Hills Community Foundation Endowment Fund allows the Foundation to accept gifts of appreciated assets:

- Financial Accounts
- Brokerage Accounts
- Life Insurance
- Retirement Accounts





### Endowment Program



Dedicated to supporting educational, cultural and humanitarian activities in the Fountain Hills area

Since 1995, the Fountain Hills Community Foundation has provided over a million dollars in financial support to education, cultural and humanitarian non-profit organization in and around the Fountain Hills area.

Some of the organizations that have received grants through the Foundation are:

- Boys & Girls Club
- Fountain Hills Community Theater
- Fountain Hills Senior Services
- Junior Achievement
- Fountain Hills Cultural and Civic Association
- Extended Hands Food Bank
- Fountain Hills Little League
- Gold Eagle Foundation
- Fountain Hills Sister Cities
- Fountain Hills Historical Society
- Boy Scouts of America
- Girl Scouts of America
- Fountain Hills Sister Cities
- Fountain Hills Ministerial Alliance



If you have any questions regarding the Fountain Hills Community Foundation Endowment Fund, please contact **Shawn C. White, Vice President of Endowment, at 480-816-9985**

[www.fountainhillscommunityfoundation.org](http://www.fountainhillscommunityfoundation.org)  
480.837.1287



Contributor \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E mail \_\_\_\_\_

Donation to: Fountain Hills Community Foundation Amount \$ \_\_\_\_\_

Mastercard  Visa  Discover  American Express  Code \_\_\_\_\_

CC# \_\_\_\_\_ Exp. \_\_\_\_\_

Check # \_\_\_\_\_  Cash Amount \$ \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please mail this form with your charitable contribution to:

Fountain Hills Community Foundation  
P.O. Box 18668 • Fountain Hills, AZ 85269