

## Leave Your Legacy Behind

Serving more foster youth in Sacramento County is our main goal, and that requires recruiting, training and supporting more CASA Volunteers. To do that, we are seeking donors who are compelled by our mission.

There are a number of methods of planned giving. These include ways to make CASA part of your legacy to ensure that deserving youth benefit from your generosity after your lifetime.

There is a sampling of methods explained briefly inside which minimize the cost of giving while maximizing the value to CASA Sacramento. If you are interested in including us in your legacy, please consult a financial or legal advisor on what method may be most advantageous to you and to determine the associated tax consequences of making a gift.

## Planned Giving Leaving Your Legacy Behind

There are many ways to support CASA Sacramento that will not affect your current lifestyle or your family's security. Simply designate CASA Sacramento to receive estate assets in the future. This allows you to make a gift that costs you nothing during your lifetime, and leaves your cash flow and current financial planning unchanged.



**CASA**  
Court Appointed Special Advocates  
**FOR CHILDREN**

SACRAMENTO COUNTY

## Legacy Society

*Creating a brighter future for  
Sacramento County's foster  
youth through planned giving.*

We invite you to create a legacy of hope for at-risk foster youth through a planned gift to Court Appointed Special Advocates of Sacramento County. Our supporters who pledge to include CASA Sacramento in their estate plan may be recognized as a member of our esteemed Legacy Society.



## What is Planned Giving?

Planned giving is the transfer of assets to a designated nonprofit organization during a lifetime or as part of an estate plan. This forward-thinking approach to giving is "planned" because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

Planned giving allows you leave your legacy behind through an expression of your personal values which merge your family, financial, and charitable goals. Planned giving is easy to do and you don't have to be wealthy to do it. The most frequently-made planned gifts are bequests made through your will.

### CASA Sacramento

Tax ID #68-0257139

P.O. Box 278383  
Sacramento, CA 95827

[www.sacramentocasa.org/donate/legacy-society](http://www.sacramentocasa.org/donate/legacy-society)

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# Ways You Can Leave Your Legacy Behind

## Gifts from Your Will or Trust

Need to preserve your assets during your lifetime? You can plan a gift to us that will only take effect after your other obligations have ceased.

- Include a bequest to CASA Sacramento in your will or trust.
- Make your bequest unrestricted or direct it to a specific purpose.
- Indicate a specific amount, or a percentage of the balance remaining in your estate or trust.

## Retirement Plan or Life Insurance Beneficiary Designations

Give us assets subject to tax consequences, then leave more to your family.

- Name CASA Sacramento as a beneficiary of your life insurance policy, IRA, 401(k), or other qualified plan.
- Designate us to receive all or a portion of the balance of your plan.
- The balance in your plan passes to CASA after your death.

## Gifts of Stock and Appreciated Assets

You can take advantage of appreciated securities without incurring capital gains tax.

- Transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to CASA Sacramento.
- CASA Sacramento then sells your securities and uses the proceeds for its programs.

## Gifts of Life Insurance

You don't need a large estate to make a significant gift to us. Here's an easy way to leverage your dollars for a larger gift.

- Transfer ownership of a paid-up life insurance policy to CASA Sacramento.
- CASA Sacramento may elect to cash in the policy or hold it.

**Tax ID #68-0257139**



*Please consult a professional financial or legal advisor before making a charitable gift. CASA Sacramento cannot render financial or legal advice, nor does this document intend to do so.*

## Next Steps

Once you have made the decision to include CASA Sacramento in the legacy you leave behind, you will:

- *Consult a professional financial or legal advisor on what method may be most advantageous to you and to determine the associated tax consequences of making a gift.*
- *If you would like to put something in place immediately, the easiest way is generally through retirement plan or life insurance beneficiary designations.*
- *Complete the legacy commitment form found on [www.sacramentocasa.org/donate/legacy-society/](http://www.sacramentocasa.org/donate/legacy-society/) and send it to us by following the directions on the form.*

## Just For Our Legacy Society Members

Committing today to help our agency thrive in the future is an incredibly meaningful gift. We have a special in our hearts for our Legacy Society members and offer our sincerest thanks in several ways.

Once we receive your legacy commitment form, you will be warmly welcomed into CASA Sacramento's Legacy Circle by one of our Executive Staff or Board Members, who will invite you for a cup of coffee.

Legacy Society members receive special recognition as follows:

- *in the lobby of our office suite*
- *on our Legacy Society website page*
- *in our quarterly agency newsletters*
- *at our annual donor reception*

