



# EntrustATL

HERE FOR GOOD.

Do you want your philanthropic legacy to be a part of something bigger? **LEAVE AN IMPACT** on the Atlanta community for generations to come with an estate gift.

Community  
Foundation  
for Greater Atlanta



EntrustATL



## WHY AN ESTATE GIFT? BECAUSE OF THE DIFFERENCE YOU CAN MAKE.

A gift through your will or trust is the ultimate gift – it is a last expression to your loved ones of what you valued during your lifetime and it provides much needed support to your cherished nonprofits. If directed to a permanent fund, this can be perpetual support far beyond your lifetime, replacing your important annual gifts.

Arranging an estate gift is within the reach of everyone and is easy to do. Our experts are here to help explain giving options and walk you through the process.

We can help you and your advisors determine the best way for you to give, to achieve the impact you want in the most tax-wise manner. You can even supplement your retirement income through an estate gift.

### Why entrust the Community Foundation with your legacy?

Because we are here to do good for good. Since 1951, we've carefully shepherded the philanthropic legacies of generations of Atlanta philanthropists and we will be here long into the future to ensure that our region, and all the residents here, thrive.

With a permanent fund, your estate gift is expertly invested with the Foundation, growing over time to make an even greater difference.

You can specify exactly how you would like your estate gift to be used and, with our commitment to donor intent, you can trust that your wishes will be carried out.

Or you can leave your estate gift to our general competitive grantmaking pool. Your gift can then be used to address changing needs and new opportunities, under the careful stewardship of Community Foundation staff.



**Virginia Hepner** loves the arts. She's so passionate about the arts that after spending years in the corporate sector, she served as the CEO of the Robert W. Woodruff Arts Center. She has provided for the organizations she loves long into the future with a planned gift through the Community Foundation earmarked for the arts.

“ Think about the organizations you support every day. You have an opportunity to continue that great work by leaving a planned gift to an organization you care about – you'll make a lasting impression. And I can't imagine a better organization to entrust with your funds than the Community Foundation. – Virginia Hepner, Community Foundation donor ”

“ I evaluated the nonprofits I had supported as an adult, wanting to continue support of charitable endeavors, plus leave a legacy. My goal was admirable, yet quite complicated until working with the Community Foundation. The fine help from my philanthropic officer was like putting new batteries in a favorite flashlight; it suddenly became easy and manageable to transform my vision into a reality. ”

– Knox Porter, Community Foundation donor

## WAYS TO GIVE

You can leave a legacy for future generations by adding to your existing fund or creating a new fund with a gift from your estate:

- **Bequest**

Name the Community Foundation for Greater Atlanta as a charitable beneficiary in your will or trust. It can be for a stated dollar amount, specific property or a percentage of the entire residue.

- **Retirement Plan Assets/IRAs**

Retirement plan accounts and IRAs are some of the most heavily taxed assets at death, potentially subject to both estate and income tax. Avoid these taxes by naming the Community Foundation as beneficiary to all or a portion of these assets. This is easy to do with online beneficiary forms.

- **Life Insurance**

Name the Community Foundation as owner and beneficiary or simply as beneficiary of an existing or new life insurance policy. A gift of life insurance may provide valuable income and estate tax savings including an immediate income tax deduction.

- **Charitable IRA Rollover (during life)**

A Charitable IRA rollover (QCD) allows you to direct up to \$100,000 from your traditional IRA to the Community Foundation tax-free.\*

*\*N/A with donor-advised funds*

- **Charitable Remainder Trust**

Receive income for your lifetime (or others you designate) from the trust. At the end of the trust, the remaining amount benefits an existing or new fund at the Community Foundation. You can improve your cash flow while saving on income taxes, deferring capital gains taxes and eliminating gift and estate taxes.

- **Charitable Lead Trust**

Establish a trust that provides annual distributions to the Foundation for your lifetime or a term of years. The remainder is then returned to you or your heirs. Benefits may include the transfer of assets to others free of estate, gift and income taxes.

- **Life Estate**

Remain living in or using your home, vacation home or farm while establishing a gift of that property to the Community Foundation. You receive an income tax deduction and the Foundation receives the property at the end of the retained life estate term, usually your lifetime.

## EnTrustATL: MORE THAN A LEGACY SOCIETY

When you arrange an estate gift to the Community Foundation for Greater Atlanta, you become a member of our philanthropic family. When you let us know of your gift, you become a member of EntrustATL, the Foundation's legacy society that recognizes and honors this special gift arrangement. In addition to the joy of knowing your legacy is in place, you receive these more tangible benefits of membership:

1

Attend Foundation events and other philanthropic learning opportunities.

2

Access to Community Foundation resources, publications, experts and our knowledge-base of nonprofits in the Atlanta region.

3

Flexibility to make changes at no cost to your planned gift benefit as your desires evolve.

### The story of Pearl Strickland and the forever gift of educational opportunity

Pearl Strickland achieved a dream that was not possible for most African Americans, including her husband George, by graduating from Atlanta's Clark College with a degree in home economics in 1909. Pearl had another dream: helping the children of family and friends pursue college degrees.

When she passed away in 1984, Pearl's estate established a scholarship fund at the Community Foundation through a gift in her estate. The original gift of \$500,000 has grown to \$1.35 million today, with more than \$1,012,206 granted out to 286 students to date. Her legacy continues to change the lives of students at the historically black colleges and universities at the Atlanta University Center.



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### ABOUT US

The Community Foundation for Greater Atlanta inspires and leads the Atlanta region toward equity and shared prosperity for all who call it home. TogetherATL is the Foundation's strategic ethos, working through a collaborative approach with community stakeholders, donors, nonprofits and others to examine complex challenges the region faces and create solutions that build a thriving region.

### INTERESTED LEARNING MORE ABOUT EnTrustATL?

For more information, visit [cfgreateratlanta.org/EnTrustATL](https://cfgreateratlanta.org/EnTrustATL) or call 404.688.5525 and ask to speak with a member of our philanthropy team.

