

## Planned Giving

We invite you to become a member of Olmsted Linear Park Alliance Legacy Fund, with a planned giving contribution. Planned giving offers you a means of accomplishing your charitable objectives consistent with your personal values and overall financial and estate plans. Your trust, estate or other planned gift strategy can be an enduring legacy of support for the Olmsted Linear Park Alliance (OLPA) and in many cases can offer significant tax advantages.

A charitable bequest is one of the easiest and most common ways to support a charity you care about. Bequests to the OLPA can be for a specific amount of money or asset, a percent of your estate.

### Benefits

- Your assets remain in your control during your lifetime.
- You can modify your bequest if your circumstances change.
- You can direct your bequest to support a particular program or purpose, or it can be unrestricted, allowing the funds to be allocated where the need is greatest.
- You have the satisfaction of knowing that your bequest will support the OLPA as you intend and as an ongoing legacy.

### Ways to Give

#### *Bequests*

Consider including a provision in your will directing that a gift be paid to the OLPA after your death or the death of one of your survivors. This can be either a specific amount of money, item of property or a percentage of the balance remaining in your estate. You can direct your bequest to a particular program or activity, or allow the OLPA to use where it's needed most.

#### *Life Insurance*

The death benefit of a life insurance policy can be paid to the OLPA as a charitable gift. For example, you can contribute a fully paid-up policy or one where some premiums remain. Or you can name the OLPA as the beneficiary of a life insurance policy you continue to own. Consult your estate attorney or life insurance agent for details.

#### *Retirement Plans*

Donors can name the OLPA as a beneficiary of all or a portion of their IRA, 401(k), or other retirement account. You can continue to take withdrawals during your lifetime, and can change the designation of the charitable beneficiary if your family's circumstances change. Consult your estate attorney for the best options available to you based on current tax law.

### Let Us Know

We hope you will tell us when you have named the OLPA in your estate planning. We would very much like the opportunity to thank you for your generosity and recognize you as a member of the 1893 Legacy Fund. As with all forms of gift planning, professional advice is important. We will be pleased to work with you and your advisors in developing a plan tailored specifically to your desires and requirements. If you would like more information on wills, including sample language for making a charitable bequest, or to have a confidential discussion, please contact Sandra Stewart Kruger at (404) 377-5361 or [sandy@atlantaolmstedpark.org](mailto:sandy@atlantaolmstedpark.org).

#### *Disclaimer*

*The Olmsted Linear Park Alliance does not provide legal or tax advice. We recommend that you seek your own legal and tax professional in connection with gift and planning matters. To ensure compliance with certain IRS requirements we disclose to you that information contained on this website is not intended or written to be used and cannot be used for the purpose of avoiding tax-related penalties.*