

BEQUESTS

There are ways you can help others today without ever jeopardizing your personal financial security. One easy way is by making a bequest in your will that specifies a dollar amount or a percentage of your estate to benefit the YouthZone Foundation. Leave your legacy by making a gift in your will to friends, family and charitable organizations. A bequest is one of the simplest ways to remember those you care about most.

LIFE INSURANCE

Many people today use life insurance as a way to make significant gifts to their favorite charitable organizations. We often find that these gifts can be very significant, low cost and also receive very favorable tax treatment. Ownership of existing or new policies on your life can be transferred to the YouthZone Foundation with the YouthZone Foundation receiving the death benefits. Certain income tax deductions are allowed. Percentage designations or contingency designations are also common.

RETAINED LIFE ESTATE

One of your valued possessions, your home, can become a valued gift to us even while you are still living in it, and even if you want your spouse or other survivor to live there for life. This arrangement is called a retained life estate.

RETIREMENT ASSETS

Retirement assets may be expensive for heirs to inherit. Naming the YouthZone Foundation as the beneficiary or percentage beneficiary of your retirement fund may provide a significant tax savings to your estate.

CHARITABLE REMAINDER TRUST

In the right circumstances, this plan can increase your income, reduce your taxes, unlock appreciated investments, rid you of investment worries and ultimately provide very important support. When you create a charitable remainder trust, you irrevocably transfer money, securities or other assets to a trust that will then pay you an income for life or for a period of years. If you wish, the trust also can pay an income to another beneficiary of your choice. At the death of the surviving beneficiary, the remaining principal in the trust goes to the YouthZone Foundation.

CHARITABLE LEAD TRUST

If your goal is to provide an inheritance for your children or grandchildren, but you would also like to make a significant charitable gift through your estate, find out how a charitable lead trust can help you satisfy both objectives. It's a charitable lead trust that can provide a significant charitable gift through your estate and provide an inheritance to your children or grandchildren.