



Serenity Hospice Foundation Legacy Society

Planning Your Charitable Legacy

serenity
HOSPICE FOUNDATION

Planned gifts include current major gifts, life income gifts, and estate gifts. Bequests that name Serenity Hospice Foundation to receive a percentage or amount from your estate are the most common. Or, choose gifts of life insurance, retirement assets, or a variety of life income arrangements such as trusts.

Thoughtful gift planning can benefit you, Serenity Hospice Foundation, and future generations. Planned gifts provide you, the donor, with the opportunity to be philanthropic and may also include a current income tax deduction.

- Gifts funded with highly appreciated assets may allow a donor to avoid or lessen capital gains tax liabilities.
- Planned gifts can ensure the work of Serenity Hospice Foundation will continue for many years to serve the community.
- Planned gifts ensure the donor's commitment to Serenity Hospice Foundation will remain after his or her lifetime.



Creating a Lasting Legacy

When considering a planned gift, you can decide how you would like your gift to be used to benefit Serenity Hospice Foundation, whether unrestricted or restricted, to a specific program.

Unrestricted Gifts

Unrestricted gifts provide maximum flexibility for Serenity Hospice Foundation. Gifts without a named purpose allow Serenity Hospice Foundation to determine how to use the funds based on its most pressing needs and vision for the future.

Bequest Language

A provision made in your will or estate plan leaving Serenity Hospice Foundation cash and/or other assets. Below are language examples of how to remember Serenity Hospice Foundation in your will for general use of your bequest.

A fixed amount of money:

"I give \$_____ (specific dollar amount) to Serenity Hospice Foundation, Tax ID No. 20-570899, located at 2999 N 44th Street, Ste 225, Phoenix, AZ 85018 for its general use and purpose.

A percentage of the estate:

"I give _____% of my estate to Serenity Hospice Foundation, Tax ID No. 20-570899, located at 2999 N 44th Street, Ste 225, Phoenix, AZ 85018 for its general use and purpose.

"I give all the residue of my estate, including real and personal property, to Serenity Hospice Foundation, Tax ID No. 20-570899, located at 2999 N 44th Street, Ste 225, Phoenix, AZ 85018 for its general use and purpose.

Life Insurance Policies

You can transfer ownership of an existing policy to Serenity Hospice Foundation or purchase a policy naming Serenity Hospice Foundation as beneficiary

IRA Charitable Rollover

The law allows individuals 70½ and older the ability to transfer up to \$100,000 directly from their individual retirement accounts to a qualified charitable organization without being subject to income taxes on the distribution. You can make this gift to Serenity Hospice Foundation, a qualified nonprofit organization.

Retirement Assets

You can designate Serenity Hospice Foundation as the beneficiary of your IRA, 401 (k) or another qualified plan. After your lifetime, the balance of the plan passes to the Foundation while you avoid all income and estate taxes.

Named Funds

Serenity Hospice Foundation can establish named funds – one or more donors may establish a named fund if the combined gift totals \$25,000. The donor's name or a name or names the donor wishes to honor or memorialize may be associated with a Named Fund. The name of the fund might also be related to its use, such as a named fund to support mission-essential areas of Serenity Hospice Foundation operations.

