

# The 1903 Society

A Legacy of Help and Hope



## The Benefits of Your Legacy Gift

- Assuring SVdP Georgia's future (and future support for the community)
- Positively impact lives for years to come (and choose use of funds)
- Preserve your legacy
- Membership in the 1903 Society
- Sizable Tax Benefits\*

\*Taxable income reduction, income tax deductions, estate tax exemptions, reduced capital gains taxes and more.

Your legacy gift to St. Vincent de Paul Georgia creates hope and lasting change.

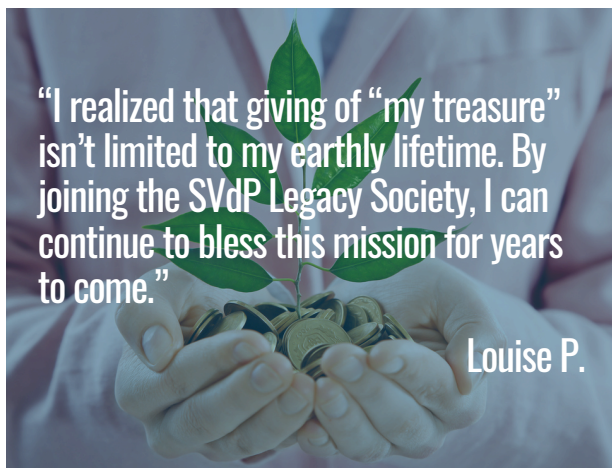
Explore a giving option that works best for your goals.

# Your Legacy of Help and Hope

## To Build and Sustain the St. Vincent de Paul Mission

Gifts to the **St. Vincent de Paul Georgia 1903 Society** are acts of hope for the future of our mission and service to our future neighbors in need. Your generosity will ensure service to those who will need us most in generations to come.

Making decisions about the future of your estate can be difficult. However, most of us will admit they are decisions we should not leave to the judgment of others. We believe that if you focus on the legacy you want to leave – the goals, needs and dreams you have for your family and St. Vincent de Paul – your decisions get a lot easier. We're here to help you explore the gift planning topics that can make the biggest impact on both.



“I realized that giving of “my treasure” isn’t limited to my earthly lifetime. By joining the SVdP Legacy Society, I can continue to bless this mission for years to come.”

Louise P.

## LEGACY GIVING AT A GLANCE

### GIFTS THROUGH YOUR WILL OR TRUST (BEQUEST)

#### Make a gift that costs you nothing during your lifetime

Document your gift of cash, property, or a percentage of your estate value.

**Your Benefit:** A gift that does not impact your current cash flow and can be adjusted as your circumstances may change

### CHARITABLE GIFT ANNUITY, CHARITABLE REMAINDER TRUST, OR CHARITABLE REMAINDER ANNUITY TRUST

#### Make a gift and receive income during your lifetime

Share your assets in a plan that provides income for life and passes the remainder to SVdP.

**Your Benefit:** Receive tax- advantaged payments along with a charitable tax deduction

### GIFT OF RETIREMENT ASSETS

#### Make a gift while leaving more of your estate to your heirs

Name SVdP as your retirement plan beneficiary and pass less-taxed assets to your heirs.

**Your Benefit:** Avoid up to 60% tax on your retirement assets; pass more of your estate to your heirs

### GIFTS OF APPRECIATED SECURITIES

#### Make a gift while avoiding capital liability

Give your appreciated stocks, bonds, or mutual funds to sell and use the proceeds.

**Your Benefit:** Make a significant gift; receive an immediate tax deduction; pay no capital gains tax

### GIFT OF LIFE INSURANCE

#### Make a large gift with a small investment

Donate a life insurance policy you no longer need or name SVdP in a policy.

**Your Benefit:** Take a tax deduction now; take possible future deductions through gifts to pay policy premium

### CHARITABLE LEAD TRUST

#### Make a gift that preserves your assets for your heirs

Use appreciating assets to create a trust to support SVdP for a period of years; pass the assets back to you or your heirs.

**Your Benefit:** Shelter your growing assets while benefiting SVdP now; reduce or eliminate gift or estate tax.

Contact Bea Perdue ([bperdue@svdpgeorgia.org](mailto:bperdue@svdpgeorgia.org)) to become a 1903 Society Member to ensure St. Vincent de Paul delivers Help and Hope to our neighbors in need for many tomorrows to come.