

**COMMUNITY LEGACY SOCIETY**



# CREATING A CHARITABLE LEGACY

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**THE DENVER FOUNDATION'S  
COMMUNITY LEGACY SOCIETY**



The Denver Foundation

## A philanthropic legacy is about lasting impact.

What difference do you want to make in the world? Are there issues you care about personally? Groups of people you want to help? Injustices you'd like to correct? Do you believe in the power of systemic change, getting at the root cause of an issue? Or would you prefer that your funds go to direct relief?

There is so much opportunity for change in the world. The Denver Foundation can help you decide where your gift will have the greatest impact. We can help you bring your philanthropic vision to life.

By working with The Denver Foundation, you can create a bequest for the future that supports the causes that you care about most, or you can leave a gift that allows the Foundation to meet the community's most critical needs over time.

Creating a charitable legacy is one of the most lasting and impactful actions you can take. The Denver Foundation is proud to partner with hundreds of committed individuals who have taken that step.

# POWER YOUR LEGACY: HOW WILL YOU GIVE?

## GIFTS FROM A WILL

Designating The Denver Foundation as a beneficiary in your will is a simple way to create a lasting charitable legacy, and it will not affect your cash flow during your lifetime. You can allocate a dollar amount, a percentage, or all or a portion of the residual. In addition, it's easy to revoke this type of gift if your situation or goals change.

## BENEFICIARY DESIGNATIONS

Naming the Foundation or your fund as the beneficiary of a retirement plan, financial account, or annuity is another easy way to support the causes you care about after your lifetime. You can continue to benefit from these assets during your lifetime.

## LIFE INSURANCE

If you have an old, unneeded life insurance policy, you can donate it to us and take an immediate tax deduction. You can also name your fund as a beneficiary of your policy.

## TANGIBLE PERSONAL PROPERTY

If you have valuable assets such as artwork, collectibles, jewelry, etc., that you no longer want or need, you can gift those to your fund now, or through your estate. The assets will be sold, and the proceeds added to the fund of your choice.

## TRUSTS

There are several vehicles that provide dual benefits to charity, to you, and/or to your heirs:

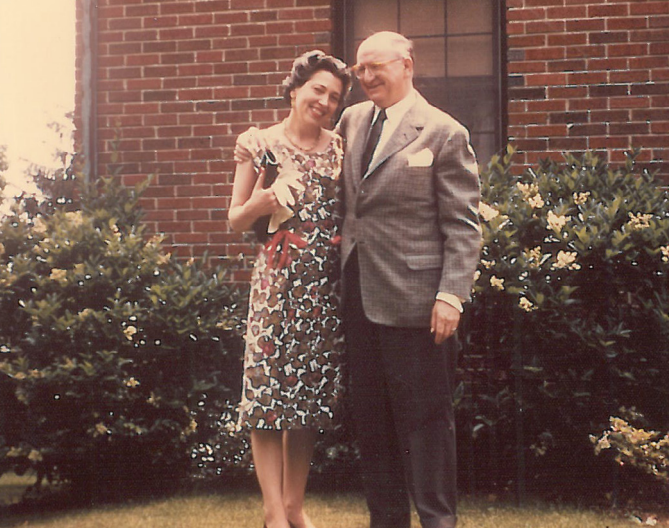
- **Charitable Remainder Trusts** are vehicles that can provide lifetime income for you or a beneficiary, with the remaining assets transferring to your chosen fund after your lifetime.
- **Charitable Lead Trusts** provide an annual gift to your fund at The Denver Foundation for a period of years, at the end of which the remainder transfers either back to you, or to your heirs.

*Gifts from wills or trusts will likely require an attorney to execute. The Denver Foundation can provide sample language for charitable designations in wills. We are also happy to connect you to professional advisors who work in this area.*

ON THE COVER: CLS MEMBERS STELLA YU AND DAVID GRIGGS

RIGHT: COMMUNITY LEGACY SOCIETY MEMBERS

From Top: Grace Stiles, Gwen Bowen, Warren and Betty Kuehner, and Frances Charskey with her husband, Louis.



# IMAGINE YOUR LEGACY: HOW WILL YOU MAKE AN IMPACT?

## DONOR-ADVISED FUND

### *Do you want to create a charitable legacy for your family?*

A donor-advised fund allows you to enjoy giving during your lifetime and appoint family members or friends as future advisors. The flexibility of a charitable giving account can be a generous gift of philanthropy for future generations.

*There is no minimum gift amount to start a donor-advised fund. Fundholders may make grants after the donor-advised fund reaches \$10,000 in assets.*

## DESIGNATED FUND

### *Do you want to support organizations near to your heart?*

A designated fund helps meet the needs of one or more designated nonprofit organizations. Endowing your designated fund ensures support of that nonprofit in perpetuity.

*Recommended for gifts of \$50,000 and more.*

## FIELD OF INTEREST FUND

### *Do you want to support your favorite causes?*

A field of interest fund allows you to make an impact in areas you are passionate about over time. Identify a specific or broad area (such as arts education, human services, or animal welfare) and The Denver Foundation will identify nonprofits in those fields as needs change over time.

*Recommended for gifts of \$50,000 and more.*

## SCHOLARSHIP FUND

### *Do you want to help students reach their educational dreams?*

A scholarship fund can be customized to support a specific academic discipline, institution, or student population. Administrative processes, including creating an online application and facilitating a selection committee, can be managed by our staff to ensure your charitable intent is met.

*Various options available for gifts of \$25,000 and more.*

## NAMED ENDOWED FUND

### *Do you want to support the changing needs of the Metro Denver community?*

A named endowed fund in The Fund for Denver supports the Foundation's grantmaking to organizations and initiatives that meet the most critical needs of the day. The Fund for Denver, the Foundation's permanent endowment, has been taking care of the future since 1925. Your gift ensures that The Denver Foundation will meet today's needs and tomorrow's opportunities for generations to come.

# COMMUNITY LEGACY SOCIETY

When you make an estate gift to The Denver Foundation, you become a part of the Community Legacy Society (CLS), the Foundation's group which honors those who have taken the extraordinary step of including us in their estate plans. As a member, you will:

- Be invited to informational and engaging events about issues in our community.
- Have opportunities to connect with other people who are philanthropically inclined.
- Have the opportunity to be recognized for your generous foresight or exercise the option to remain anonymous, if you prefer. The amount of recognition you receive is completely up to you.
- Rest easy knowing that your gift will be thoughtfully stewarded and have its intended impact.

*To learn more about the Community Legacy Society, please call 303.300.1790 and ask to speak to a member of the Philanthropic Services Group.*

*Below: CLS members Dan and Barbara Berv at their home in Denver.*



The Denver Foundation

The Denver Foundation  
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## HOW TO MAKE YOUR LEGACY GIFT

### 1 CONTACT THE FOUNDATION

Help us prepare to fulfill your legacy. Notifying us of your intent and communicating your wishes prepares us to steward your planned gift.

### 2 DEFINE AND DESIGN YOUR LEGACY

The Denver Foundation is available to work in partnership with you to create your philanthropic legacy. We'll help you focus your vision by clarifying the issues most important to you and the change you'd like to see. We'll also suggest which types of charitable funds are best suited to achieve the impact you hope to make.

### 3 NOTIFY YOUR PROFESSIONAL ADVISOR

Your professional advisor can help you decide the best type of gift to fund your legacy. Gift types include wills, beneficiary designations, life insurance, personal property, and trusts.

Your advisor will also create or update all documents associated with your gift. If you do not have a financial advisor, the Foundation is happy to provide referrals to advisors with philanthropic planning experience.

### 4 ENGAGE AS A COMMUNITY LEGACY SOCIETY MEMBER

Join us for issue briefings, local and national guest speakers, investment updates, and networking events. CLS members also receive our quarterly newsletters and bi-annual issues of Give magazine.