



Legacy Society Options

Thank you for considering a legacy gift for Homage Senior Services. This document is designed to provide you with basic information to start your planned giving process should you need.

There are a variety of ways to structure planned gifts based on your immediate and future needs. A few are listed here and we recommend that you consult with an estate planning professional, financial advisor, and/or a tax professional to design the most appropriate gift for your circumstances.

Gifts of Retirement Funds, Life Insurance, and Bank Accounts

These are gifts you can easily establish on your own without the help of estate planning professionals.

- Contact the administrator of your retirement plan, life insurance policy, and/or bank accounts for their specific procedures.
- Name Homage Senior Services as a beneficiary and designate a fixed amount or percentage.

Gifts through your Will or Living Trust

These gifts often require the help of estate planning professionals.

- Name Homage Senior Services as a beneficiary and designate a fixed amount, specific asset, or percentage of your estate through a will or revocable living trust.

Other Ways to Give

These gifts often require the help of estate planning, financial, and/or tax professionals.

- **Cash:** Make an immediate donation to the Homage Endowment Fund (through the Community Foundation of Snohomish County) or establish your own endowment fund and take a charitable income tax deduction as provided by law.
- **Appreciated Assets:** Contribute appreciated assets, such as stock or real estate, and receive a charitable tax income deduction based on the value of the assets, reducing capital gains taxes.
- **Gift Annuities:** Establish a gift annuity that provides you with a lifetime income.
- **Charitable Trusts:** Establish a charitable remainder trust that provides you with a fixed or variable lifetime income and receive a charitable income tax deduction at the same time.
- **Retained Life Estate Gifts:** Donate property (home and/or land), enjoy the benefits of home ownership for life, and take a partial charitable income tax deduction immediately.

Legacy Society

Please let us know if you have designated Homage Senior Services in your estate plans so we can officially welcome you to our Legacy Society. Together, we can keep seniors and people with disabilities living independently and with dignity.

Questions Carla Fondrick, Individual & Corporate Giving Officer, 425-265-2294, cfondrick@homage.org

Homage Senior Services

5026 196th St. SW
Lynnwood, WA 98036
Tax ID: 91-0910680



Legacy Society Membership Form

Homage Senior Services welcomes you to our Legacy Society and treasures the opportunity to pay tribute today to those who have included the organization through various forms of strategic giving, including their estate plans. We applaud your lasting commitment to a community where independence, dignity, and quality of life are promoted and supported for older adults and people with disabilities. To acknowledge your generous planning on our behalf, we would like to ask you for the following information. (Please note all information is strictly confidential.)

Contact Information

| | | | |
|----------------|--------|-----------|-----------|
| Date | | | |
| Name | | | Nickname: |
| Street Address | | | Apt: |
| City | State: | Zip Code: | |
| Day Phone | | | |
| Evening Phone | | | |
| Email | | | |

Gift Details

| |
|--------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> I have included/intend to include a gift to Homage Senior Services in my will. |
| <input type="checkbox"/> I have named/intend to name Homage Senior Services as a beneficiary to a life insurance policy. |
| <input type="checkbox"/> I have named/intend to name Homage Senior Services as a beneficiary of an IRA or 401K. |
| <input type="checkbox"/> I have/intend to set up a charitable trust for Homage Senior Services. |
| <input type="checkbox"/> I have/would like to customize a planned gift for Homage Senior Services. (Please contact me.) |
| <input type="checkbox"/> Other |

Gift Recognition

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| With this gift, we'd like to welcome you to our Legacy Society. Please let us know how you would like to be listed in our Legacy Society materials or if you would like to remain anonymous. |
| |

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Return this Form

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