

# 5 EASY WAYS

## TO MAKE A PLANNED GIFT

1

### BENEFICIARY DESIGNATION OF AN IRA, 401(K), OR RETIREMENT PLAN

- Adding Resurrection as a partial or full beneficiary of your retirement account is easy, flexible, and revocable.
- Beneficiary forms can be accessed and completed ONLINE and “in minutes” through most financial institutions and IRA custodians. You can also contact your insurance representative to make this change.
- After your lifetime, your gift is made immediately to Resurrection to help us continue the important work in the community that means so much to you.

2

### BENEFICIARY DESIGNATION OF A LIFE INSURANCE POLICY OR HSA

- Adding Resurrection as a primary or secondary beneficiary for your life insurance policy is easy! And your designation can be adjusted or changed by you at any time.
- Younger, employed individuals can also name our organization as a beneficiary of their Group Term Life Insurance Policy, 401(k), or HSA Account at their place of work.
- And if you have a “paid up” life insurance policy that you no longer need, you can transfer the ownership of the policy directly to Resurrection. In return, you receive a generous income tax deduction for your gift!

3

### PAYABLE ON DEATH DESIGNATION FOR BANK AND BROKERAGE ACCOUNTS, CERTIFICATES OF DEPOSIT, OR REAL ESTATE

- Payable on Death (or Transfer on Death) designations can be created easily to distribute a bank account, certificate of deposit, or brokerage account after your lifetime.
- Your residence, vacation home, or other real estate can also utilize a POD designation to be transferred after your lifetime.
- A simple one-page deed is prepared and filed in the County where the property is located.
- These POD designations are simple, flexible, and revocable at any time!

## 4

### SIMPLE BEQUEST THROUGH A CODICIL OR AMENDMENT

- A new bequest through your will or trust, is as simple as having a short 1 ½ page codicil or amendment prepared by an attorney. Your full estate plan should NOT need to be rewritten to make this special gift provision.
- Your charitable gift can be a specific amount, a percentage of your estate, or a “remainder” interest in your estate, after distributions to your other heirs are made.
- “Leaving your legacy” can have an important and lasting impact on those in the community who rely on our support to thrive in the future... even after your lifetime.

## 5

### GIFTS OF APPRECIATED SECURITIES

- A gift of appreciated securities, such as a stock or mutual fund, is a great way to support Resurrection through your generosity.
- In fact, giving a stock that may have appreciated in value is one of the BEST WAYS for you to benefit from making charitable gifts.
- You receive an income tax deduction based on the full “market value” of the stock, up to 30% of your adjusted gross income.
- The “cost” of making your gift is the price you paid for the stock, which is less than the full gift amount if made by a gift of cash or check.

Resurrection

**Foundation**

### CONTACT US

Let us share more about how anyone can use one or more of these FIVE EASY WAYS to make a planned gift to Resurrection. For more information, please contact Debi Nixon at 913-544-0709 or [debi.nixon@cor.org](mailto:debi.nixon@cor.org).

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