



The Ladies of Charity of Metropolitan Kansas City

Legacy Society

Continue your Legacy with a planned gift to
Ladies of Charity of Metropolitan Kansas City.

Planned Giving refers to charitable gifts that require some planning before they are made. Planned gifts are a way for donors to continue support to a mission they are committed too and in some cases receive valuable tax benefits.

Ways to leave a Legacy

Will and Bequests: Donor bequests in their will a cash amount, an asset, or a percentage of their estate to the Ladies of Charity of Metropolitan Kansas City. There may be a charitable estate tax deduction.*

Life Insurance: Donor names the Ladies of Charity of Metropolitan Kansas City as a beneficiary of a life insurance policy. By doing this, you may receive a charitable deduction and remove the life insurance policy from your taxable estate.*

Your life insurance company can supply the forms necessary to complete this type of gift.

Charitable Remainder Trust: Donor can set-up a charitable remainder trust and designate the Ladies of Charity of Metropolitan Kansas City as the beneficiary, with the help of an attorney, tax professional or investment professional. Donor will receive income each year for the rest of their life from assets in the trust. After their lifetime, the balance in the trust goes to the designated beneficiary.

Retirement Funds: Most retirement plans, including 401(k)s and IRAs, are income tax-deferred assets, meaning that income tax is not paid until the funds are distributed to you during your lifetime, or upon your death. Because they will continue to be subject to income taxes to your beneficiaries after your death, retirement assets make ideal gifts to tax-exempt charitable organizations such as Ladies of Charity of Metropolitan Kansas City. By naming Ladies of Charity of Metropolitan Kansas City as the primary or secondary beneficiary of your retirement account, your heirs will be able to avoid all income and estate taxes on your retirement plan assets..

***You can leave a legacy** - by including Ladies of Charity of Metropolitan Kansas City and other organizations or causes you care about, in your estate plans, the impact of your life can be felt and remembered for generations.*

* This information is not intended as legal, tax or investment advice. For such advice, please consult an attorney, tax professional or investment professional.