



TRI-LAKES
CARES



A SIMPLE WAY TO LEAVE A LEGACY

Thoughtful ways to support
our neighbors, now and for
years to come

You don't need a large estate or significant wealth to leave a legacy. Many of the most meaningful gifts we receive come from donors who simply wanted their generosity to continue. This guide walks through a few simple ways to do that, in plain language, so you can decide what fits your life and bring the right questions to your attorney or financial advisor.

GIFTS FOR TOMORROW

These two options don't affect your finances today. You keep full use of the asset during your lifetime, and the gift takes effect later.

Beneficiary Designation

Beneficiary designations Already have a retirement account or life insurance policy? Naming Tri-Lakes Cares as a beneficiary is one of the simplest ways to leave a lasting gift. It doesn't affect your finances today and can be updated anytime as your life changes, no attorney required.

How to do it: Log in to your retirement account or life insurance provider's portal and update your beneficiary information to include Tri-Lakes Cares.

Bequests, through your will or trust

A bequest doesn't affect your finances today, yet it can be one of the most meaningful gifts you ever make. With a simple update to your will or living trust, you can leave a gift of any size, ensuring our neighbors have food, housing, and support for years to come.

Sample language to share with your attorney: *"I give to Tri-Lakes Cares, EIN 74-2501356, [a specific dollar amount, percentage of my estate, or the residue of my estate], to be used for its general charitable purposes."*

Already included Tri-Lakes Cares in your will or named us a beneficiary? Please let us know. Sharing your intentions helps us plan for the future and thank you properly today.

GIFTS FOR TODAY

These three options use assets you already have, a fund, an account, or shares, to make an impact today.

Donor-advised funds (DAFs)

If you have a DAF, often through a provider like Fidelity Charitable, Schwab Charitable, DAFgiving360, or your local community foundation, recommending a grant to Tri-Lakes Cares takes just a few minutes.

How to do it: Log in to your DAF provider's portal and search for Tri-Lakes Cares by name or EIN, then recommend your grant.

Qualified Charitable Distributions (QCDs)

If you're 70 1/2 or older, you can direct a gift from your IRA directly to Tri-Lakes Cares. A QCD can satisfy some or all of your required minimum distribution, and the amount given typically isn't counted as taxable income.

How to do it: Contact your IRA custodian to request a QCD using our legal name and EIN. Let us know it's coming so we can properly thank you.

Gifts of stock

Donating appreciated stock directly can be one of the most tax-efficient ways to give. By transferring shares instead of selling them first, you may avoid capital gains tax altogether, often making your gift go further than an equivalent cash donation.

How to do it: Share our stock delivery instructions with your broker or financial advisor to initiate the transfer.

Legal name: Tri-Lakes Cares EIN: 74-2501356

WHY PLANNED GIVING?

Join a community of thoughtful supporters like Mark Steinberg and Debbie Might, who've chosen to extend their impact beyond today.

"We want to make sure that our gift has a lasting impact on the people and the community we care about deeply," said Debbie Might, Donor and Volunteer.



Have a question about giving?

Bill Lyons, Director of Development & Planning - (719) 370-1315

235 N. Jefferson St. Monument, CO 80132

Tri-LakesCares.org/planned-giving



We care about your future. Please consult with your tax advisor or financial professional before making decisions about planned giving. This guide is for informational purposes only and is not legal or tax advice.