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 *Today*

DAFs A Donor-Advised Fund (DAF) is a giving account you contribute to now, take the tax deduction today, and grant to Tri-Lakes Cares whenever you're ready.
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.

QCDs A Qualified Charitable Distribution (QCD) lets you send a gift straight from your IRA to TLC, tax-free, if you're 70½ or older, and it can count toward your required distribution.
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.

Stock Gift With markets up significantly in recent years, donate appreciated stock directly to Tri-Lakes Cares, and avoid the capital gains tax — the full value still counts as your gift.
How to do it: Share our stock delivery instructions with your broker or financial advisor to initiate the transfer.

Gifts for Tomorrow

Bequests Leave a gift to Tri-Lakes Cares in your will or living trust — it costs you nothing today, and you can change your mind anytime.
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."

Beneficiary Name Tri-Lakes Cares as a beneficiary on a retirement account or life insurance policy — no attorney required, update anytime.
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.

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.

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.



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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.