



# Leaving a Legacy

1749 Society



Make it happen



Rick and Carol Smith joined the 1749 Society by naming the Community Foundation in their wills because they knew they wanted to give back to their community. They both have a long history in York: Rick grew up on a farm in York, and Carol lived on Pershing Avenue in the city.

Carol grew up as an avid reader, and spent many hours at Martin Library devouring every horse and dog book available. When she was allowed to move up to the library's adult reading section, Carol was thrilled. A special place remains in her heart for Martin Library, and she wants to ensure that other children in the city continue to have the opportunity to develop her same passion for reading.

Rick's varied interests and community activities fit well with his future gift to the very flexible Fund for York County. Rick has been selling real estate in York since 1966. Rick and Carol believe in the importance of giving back and feel they are lucky to be in the position to do just that. "It is not so much about what you make in life, but what you give back," says Rick. Carol adds, "Helping... where and how one can is what life is about."



**Named for the year in which York County, Pennsylvania was founded,** the 1749 Society was created to recognize those individuals whose estate planning includes a gift to York County Community Foundation. Often called the ultimate gift because it is accomplished after an individual's lifetime, a bequest ensures that the donor's wishes are carried out to make a gift which will benefit future York Countians.

## How it works

- The 1749 Society provides a unique opportunity for you to partner with the Community Foundation during your lifetime and to plan for the future at the same time. Joining the 1749 Society is as simple as including York County Community Foundation in your estate as a beneficiary. Completing our Letter of Instruction allows you to let us know how to carry out your legacy.
- Bequests may be created by will or by revocable and irrevocable trusts and may be designated in a number of ways. They may be funded by a specific amount of money, a percentage of your estate, or a particular asset, such as stocks or real estate. York County Community Foundation may be named as the recipient of all or part of your estate, or as contingent beneficiary in the event beneficiaries do not outlive you.
- Another option to consider is a life income gift, which is an excellent way to supplement one's income during retirement, while also making a charitable gift. Or you may wish to provide for a loved one after your death while naming a favorite charity as the final beneficiary. York County Community Foundation is equipped to create these types of gift arrangements that would help you maximize the benefits of philanthropy for you and your family and create a legacy of endowed charitable giving in York County.



## Ten reasons people choose to give through community foundation



### one

We are a **local organization** with deep roots in the community.

### two

Our professional program staff has **broad expertise** regarding community issues and needs.

### three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

### four

Our funds help people **invest in the causes** they care about most.

### five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

### six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

### seven

We offer maximum **tax advantage** for most gifts under federal law.

### eight

We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

### nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

### ten

We are a **community leader**, convening agencies and coordinating resources to create positive change.

## More benefits

Leaving a Legacy enables you to maximize the benefits of philanthropy while completing your financial and estate planning. Recognizing that different people have different financial and estate planning needs, York County Community Foundation will work with you and your advisors to help to develop the best plan for you.

Creating a meaningful and financially sound estate plan is of critical importance to all of us, regardless of the size of our estate. It is our final opportunity to assure that our wishes are carried out with regard to the assets we have accumulated during our lifetime, our family's future, and the future viability of the charitable organizations we care about and have supported during our lifetime.



*York County Community Foundation creates a vibrant York County by engaging donors, providing community leadership, and investing in high-impact initiatives while building endowment for future generations.*

*Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.*

*You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Most charitable gifts qualify for maximum tax advantage under federal law. For more information and ideas on ways to intergrate your financial planning with charitable giving, ask your financial advisor or contact your community foundation.*

## For more information contact:

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