



IT'S NEVER TOO EARLY TO PLAN FOR THE FUTURE

We look forward to helping you create a plan that addresses your unique needs and goals at every life stage.

If after reading this brochure you have questions or would like to get started creating or updating your charitable plan, please give us a call. You can also request our free Wills Guide, a guide to planning your will and trust and be referred to a qualified estate planning attorney. Contact us or visit our website today.



How Can We Help You?

I want to know more ways to increase my giving and save money for family and myself.

- Please contact me with more information about creating a planned gift.
- I have already included the NCMF or Masonic charities in my will.
- I already make annual gifts and would like to learn how my giving can go further.

The best way to contact me is by:

- E-mail Mail Phone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

E-mail _____

Mail to:



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CHARITABLE BEQUEST

A charitable bequest is a gift that everyone can make at any life stage. If you have children or own property, you need to have a plan for the future. Don't forget to include charity in your planning. A charitable bequest is still the easiest way for you to help our mission. Your attorney can include language in your will or trust directing that a gift be made to our organization. Your estate will benefit from an estate tax charitable deduction and you will have peace of mind knowing that you helped further our good work.

Whatever your life stage, it's important to have a plan that provides for your security and the care of your loved ones. The goal of this brochure is to explain charitable options that will help you meet your goals, provide future income, care for your family after you are gone, provide estate tax savings and leave a lifetime legacy to charity.



CREATING INCOME FOR YOU AND YOUR LOVED ONES



DEFERRED CHARITABLE GIFT ANNUITY

You may not be ready yet for retirement, but if you are thinking about the future, a deferred charitable gift annuity is one way for you to make a gift now for income in the future. When you make a gift to us today of your cash or an appreciated asset (like stock), we will promise to begin paying you income at a future date. This income will be fixed, meaning that it will never change and will be paid to you at a rate based on your age and the payout date you select.

Check with us about flexible options if you haven't set a date for your future retirement. Other benefits of this plan include a charitable income tax deduction for your gift this year and the possibility of tax-free income in the future. Contact us to see a deferred charitable gift annuity proposal for you with your payout rate.



RETIREMENT UNITRUST

A retirement unitrust is another way for you to make a charitable gift today and plan for the future. A retirement unitrust is a type of charitable remainder trust. You can make a gift of cash or your property to fund the trust and receive a charitable deduction this year. When you decide that you are ready to retire, at any point in the future, you can notify the trustee to begin making payments to you from the trust assets. The payments will be based on a percentage of the current trust value and can increase over time with growth in the trust.

The benefits of a retirement unitrust are numerous. If you own stock or other appreciated property that you wish to sell without paying high capital gains tax, the retirement unitrust will sell your assets tax free. If you have assets that are generating little or no income, the retirement unitrust will convert these assets into an income stream for your future. For more information or to see an illustration of a retirement unitrust for you, please contact us today.