

## The Boundless Legacy Society

When you support Lakeshore through a deferred or planned gift, your foresight and leadership will make a truly meaningful contribution to the lives that follow. To perpetually recognize these very personal and enduring gifts, Lakeshore has established The Boundless Legacy Society. Open to members, donors and friends who make long-range plans through bequests, life income arrangements and contract gifts, The Boundless Legacy Society communicates your support of the important charitable work of Lakeshore in the years to come.

*For more information, on how to become a member of The Boundless Legacy Society, receive sample bequest language, or discuss a gift that best meets your charitable and financial objectives, please contact Natalie Hausman-Weiss, at (205) 313-7420, natalieh@lakeshore.org, or return the attached information card. We maintain the strictest confidence and we have no products to sell or promote other than our absolute dedication to improving the lives of individuals with physical disabilities and chronic health conditions.*

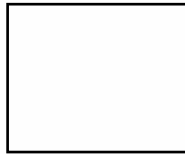
Lakeshore Foundation is a qualified 501(c)(3) public charity recognized by the Alabama attorney general and the IRS.

***We encourage you to discuss with us, and your professional legal or financial advisor, how you can sustain Lakeshore's mission through a planned gift. Lakeshore Foundation does not render legal or tax advice to donors.***

## Deferred Giving Can Be Mutually Beneficial

During difficult and uncertain financial times, many individuals and couples utilize deferred giving to achieve their financial as well as charitable goals. Estate planning allows you to employ many of the tax advantages available in the IRS Code. Some benefits include increasing gifts to heirs, providing income for life for yourself or someone important to you and leveraging or redirecting tax dollars to make a lasting and significant contribution to Lakeshore Foundation.

Whether you are single, married, raising a family, planning for retirement years, or enjoying your senior years, Lakeshore Foundation has the professional staff to assist you in achieving your charitable goals while honoring your intentions, leveraging tax advantages or structuring a life income gift for you or your loved ones.



**LAKESHORE**  
F O U N D A T I O N

*Serving people with physical disabilities*

4000 Ridgeway Drive  
Birmingham, AL 35209  
205-313-7400  
www.lakeshore.org

# Your planned gift can help ensure a safe climb



**LAKESHORE**  
F O U N D A T I O N



Since 1984 Lakeshore Foundation has provided people of all ages with physical disabilities and chronic health conditions opportunities to pursue active, healthy and independent lives.

Through dozens of specialized programs and services supervised by a professional staff using world-class facilities and adaptive equipment, Lakeshore has become a nationally recognized leader in responding to physical disabilities. To sustain these high standards in the years ahead, we invite our members, donors and friends to arrange a deferred or future gift to Lakeshore Foundation. Your commitment will ensure that Lakeshore continues to meet the ever-changing and growing demand for our services.



**LAKESHORE**  
FOUNDATION  
*Serving people with physical disabilities*

### INFORMATION REQUEST CARD

I would like information on how to plan a gift in my will or living trust.

I have included a gift to Lakeshore Foundation in my estate plan.

I would like information about a gift that provides lifetime income for me or someone else.

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Date of Birth \_\_\_\_\_

E-mail \_\_\_\_\_

To ensure your privacy, please mail this card in a separate envelope to: Natalie Hausman-Weiss, Lakeshore Foundation, 4000 Ridgeway Drive, Birmingham, AL 35209

## Long Term Tax Savings

### Life Income Gifts

A gift of cash, stock or real estate can allow you to transfer your assets now and receive income either immediately or during retirement years. A life income gift can allow you to: 1) increase your income for life; 2) receive an immediate charitable tax deduction; 3) avoid capital gains tax on appreciated assets; and 4) make a meaningful contribution to Lakeshore.

- Charitable Gift Annuity – Lakeshore is registered with the Alabama Securities Commission to offer Charitable Gift Annuities. You can purchase a contract, either immediate or deferred, and then you, or your designated beneficiary, receive annual income for life.
- Charitable Remainder Trust – You, or your designated beneficiary, receive income payments first, then the REMAINDER of the trust is transferred to Lakeshore.
- Charitable Remainder Unitrust – Same as above, but here you may make additional tax deductible contributions throughout life.

- Charitable Lead Trust – Lakeshore receives the income first (LEAD), then you, or your designated beneficiary, receive the balance of the trust.

### Bequests

Providing instructions to orderly distribute assets through careful estate planning is very important. Without a will, the State of Alabama has intestate laws that make these directives for you, which may not reflect your intentions. For example, state taxes, especially on estates with large IRA assets, can be reduced by 50% to 80%. Since Lakeshore Foundation is a qualified public charity, it is not subject to taxation; therefore, all bequests retain 100% of their value.

### Contract Gifts

Life insurance policies, qualified retirement plans (IRA), certificates of deposit, and real estate deeds are ideal to transfer to Lakeshore. These gifts bypass probate and are not diminished by taxation. Moreover, if you irrevocably transfer this property to Lakeshore Foundation, the full taxable value is excluded from your estate.