

GIFT OPTIONS

Leaving a Legacy with naming opportunities through a testamentary gift after your lifetime will memorialize the things that are important to you.

There are three types of irrevocable gifts that can help create your Legacy while supporting the work of The Salvation Army:

Testamentary Agreement
for a Named Endowment
("TANE")

Bequest Gift Agreement
("BGA")

The Stretch IRA Protection Trust
("SIP Trust")



I want to know more about creating a Legacy and providing future support for those less fortunate in my community.

- ☐ Please contact me with more information on *Named Endowments*.
- ☐ Please contact me with more information on *Bequest Gift Agreements*.
- ☐ Please contact me with more information on *SIP Trusts*.
- ☐ I have already included The Salvation Army in my Will or Living Trust

Name

Street

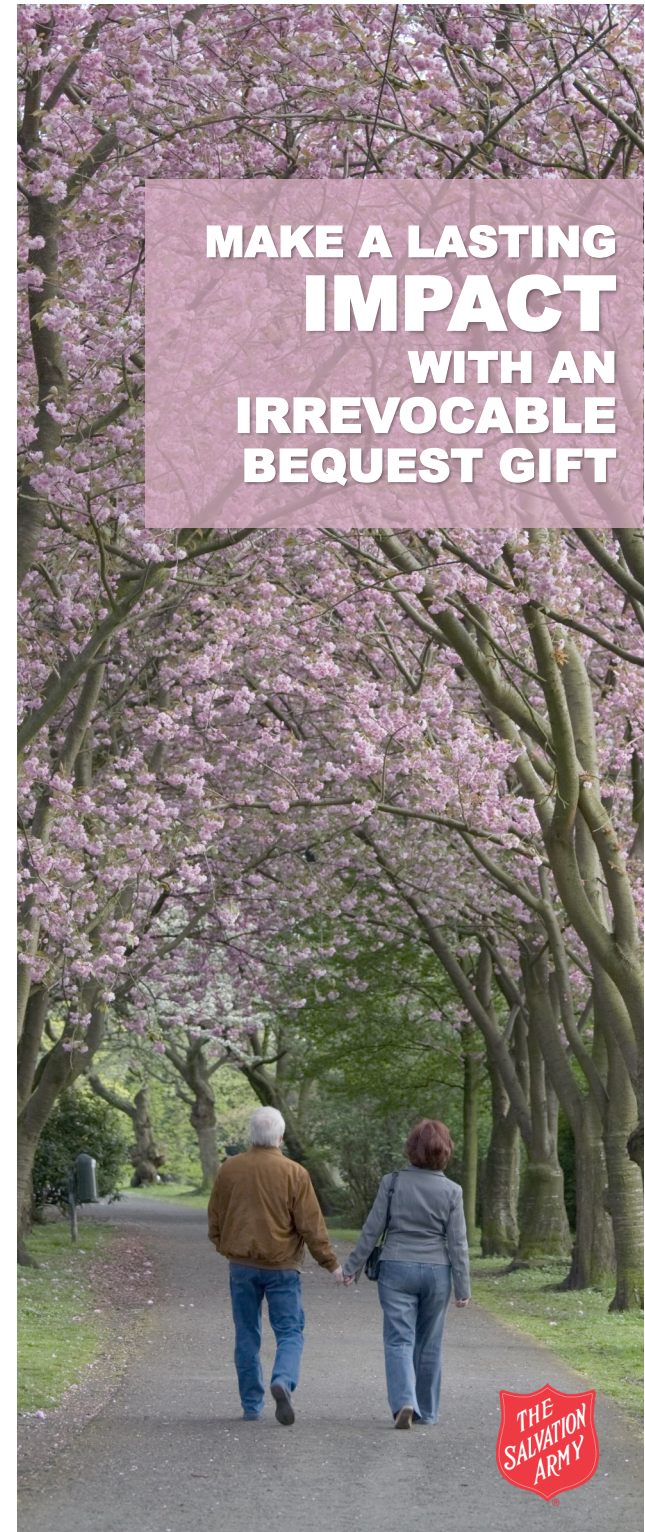
City/State/Zip

Phone

Email

All inquiries are treated with complete confidentiality. This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

**MAKE A LASTING
IMPACT
WITH AN
IRREVOCABLE
BEQUEST GIFT**



TESTAMENTARY AGREEMENT FOR A NAMED ENDOWMENT (‘TANE’)

A *Testamentary Agreement for a Named Endowment* expresses your commitment to helping others. Your irrevocable gift by Will, Living Trust, or Beneficiary Designation creates an Endowment that pays a percentage annually to your favorite Salvation Army program in perpetuity.

Your Endowment can be named after you, a loved one, or a friend. Starting at \$100,000, your Endowment will significantly impact the future.



By establishing your Endowment now, you can be assured that the values you cherish will be sustained for future generations through our programs and services.



DOING
THE MOST
GOOD®

BEQUEST GIFT AGREEMENT (‘BGA’)

A testamentary irrevocable *Bequest Gift Agreement* is designed to support the infra-structure of our programs. The Salvation Army operates its program facilities with support from generous and compassionate friends like you.

Your GIFT will become a
LEGACY of SUPPORT
for our **GOOD WORK**

Naming rights for a building, program, or classroom with a designated gift of 50% of the funding value lets the community know that this is where your heart was led, and so, this is where your treasure was shared.



STRETCH IRA PROTECTION TRUST (‘SIP TRUST’)

Are your Children Protected when they Inherit your IRA?

In the past, the lifetime stretch feature protected those inheriting IRA assets. Heirs were able to ‘stretch’ the payments over their lifetime.

The Secure Act now restricts that protection to 10 years, except for spouses and exempted groups. All other beneficiaries must take distribution of all of their IRA assets within 10 years and lose as much as 40% to taxes.

SIP TRUST BENEFITS:

- ◆ You continue to use and manage your IRA during your lifetime.
- ◆ When your IRA transfers to your children, no taxes are paid on the IRA when assets are distributed to the Trust.
- ◆ Your children receive secure **income for life that could grow to two or three times the original IRA amount.**
- ◆ Your grandchildren can receive secure income for up to 20 years.
- ◆ Allows for continued tax-free growth within the Trust.
- ◆ After your children’s lifetime, the remaining funds help families in need in your community.