



Creating a Testamentary Named Endowment

Securing Your Legacy Through Thoughtful Planning

Honoring your Family in Memorial

What is a Testamentary Named Endowment?

A testamentary endowment is a lasting legacy you can create through your Will, Living Trust, IRA, Gift Annuity (CGA) or Donor-Advised Fund (DAF). It allows you to support causes and organizations you care about long after your lifetime.



Sources for Creating an Endowment

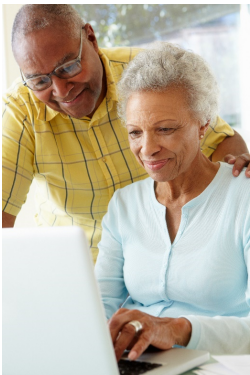
- ✓ Will: Your Will can allocate a portion of your estate to establish the named Endowment.
- ✓ Living Trust: Your Living Trust can specify Endowment funding upon your passing.
- ✓ IRA: Name the Endowment as a beneficiary of your Individual Retirement Account.
- ✓ CGA: Use the remainder value of your gift annuity to establish a named Endowment.
- ✓ DAF: Use your Donor-Advised Fund to create the Endowment.

Benefits of a Named Endowment

- ✓ Perpetual Impact: The Endowment ensures ongoing support for the causes you care about.
- ✓ Memorial Tribute: Honor your family and keep their legacy alive for future generations.
- ✓ Tax Advantages: Potential tax benefits for your heirs.
- ✓ Personal Satisfaction: Knowing that your gift will make a lasting impact.

How to Get Started

- ✓ Consult with your Salvation Army Charitable Gift Planner.
- ✓ Decide on the source(s) of your Endowment funding.
- ✓ The Salvation Army will create a Testamentary Agreement for you to review with your advisors.



Creating a Testamentary Named Endowment is a powerful way to ensure your family's memory and values are honored for years to come.



Please contact us directly for more information.