

# One Legacy Donor's Story



*Green Valleys Association received a bequest from Ann Smith. Green Valleys never knew her. But she knew the organization, and she watched what the Green Valleys did over the years.*

*She told her estate planning attorney about the Green Valleys endowment fund at the Community Foundation. She made a significant gift from her estate...a gift that made a huge difference in Green Valleys ability to thrive as a nonprofit.*

*Since it was a bequest from her life's savings, Mrs. Smith wanted the Community Foundation to invest the principal, and use the investment earnings for Green Valleys day to day needs.*

*At that point, Green Valleys realized the importance of spreading the word about the organization's goals, aspirations, accomplishments, and stewardship. For those the Community Foundation serves, and for those we serve now and forever.*

## Planned Giving... a winning combination

◆ Commemorative legacy



◆ Short-term and long-term generosity

◆ Tax incentives

# Let Your Legacy Make a Difference

The **Green Valleys Association** partners with the Chester County Community Foundation for planning giving and endowment management services.

### CONSULT YOUR ADVISORS

We encourage you to consult with qualified counsel regarding your overall plans and options. The Community Foundation can confidentially provide you and your advisors with details on planned giving options.

### MISSION

To protect, preserve, and restore the natural waterways of northern Chester County. We inspire, educate, and involve our community to make a difference for our generation and for generations to come.

The **Green Valleys Association Endowment Fund** is managed by the  
Chester County Community Foundation  
28 West Market Street, The Lincoln Building  
West Chester, PA 19382  
(610) 696-8211 • (610) 696-8213  
[www.chescocf.org](http://www.chescocf.org) • [info@chescocf.org](mailto:info@chescocf.org)



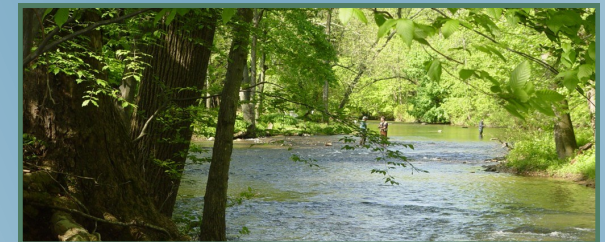
A copy of the official registration & financial information for the Chester County Community Foundation may be obtained by calling the PA Department of State at 1-800-732-0900 (toll free in PA). Registration does not imply endorsement. EIN 23-2773822.

# Green Valleys Association



GREEN VALLEYS  
WATERSHED  
ASSOCIATION

## Gift Planning



## Let Your Legacy Make a Difference

1368 Prizer Road  
Pottstown, PA 19465

610-469-4900

[gva@greenvalleys.org](mailto:gva@greenvalleys.org)

**DRAFT**

# Planned Giving Options

In addition to gifts of cash, stocks and other securities, options include:

## BEQUESTS

- Most popular form of planned giving
- Include in your will: "I give \_\_\_% or \$\_\_\_ or the remainder of my estate to the **Green Valleys Association** Endowment Fund at the Chester County Community Foundation, EIN 23-2773822."

## RETIREMENT ASSETS

- A gift from your IRA, 401K, 403B, pension or other tax deferred plan is generally tax-free if gifted directly to charity (and generally taxable when gifted to heirs).
- For a tax free transfer, designate on your Retirement Plan Beneficiary Designation Form "**Green Valleys Association** Endowment Fund at the Chester County Community Foundation, EIN 23-2773822."

## CHARITABLE GIFT ANNUITIES

- "Have your cake and eat it too" option
- Transfer cash or marketable securities to the **Green Valleys Association** Endowment Fund and benefit from a current income tax deduction
- Community Foundation pays the donor or other named beneficiary a specified amount during their lifetime
- Remaining principal goes to the **Green Valleys Association** Endowment Fund at the Community Foundation

## LIFE INSURANCE

- A substantial gift via a modest contribution of insurance premiums
- Donor names the **Green Valleys Association** Endowment Fund as a beneficiary or contingent beneficiary of an existing policy; or donates a fully paid policy.

# What Is Your Legacy?

Planned giving philanthropy...

- ◆ Ensures continuing support for causes you care about, in perpetuity
- ◆ Beneficial impact on community + charity + heirs + your legacy
  - ◆ Inspiration
  - ◆ Satisfaction
  - ◆ Permanence
  - ◆ Stewardship
  - ◆ Commemoration



# Legacy Gifts

\_\_\_ I/We would like to discuss options in person.

\_\_\_ I/We have made a provision for the **Green Valley Association** Endowment Fund in my/our estate plans.

\_\_\_ Include me/us in the **Green Valleys Association** Legacy Society listings and events.

\_\_\_ Anonymous / confidential

NAME

ADDRESS

PHONE

E-MAIL

I/We would like to learn more about:

\_\_\_ Gifts of Stocks and Securities

\_\_\_ Bequest language/options/estate attorneys

\_\_\_ IRA/Retirement Assets

\_\_\_ Life Insurance

\_\_\_ Charitable Gift Annuity

\_\_\_ Charitable Trusts

\_\_\_ Real Estate

Please return to:  
Green Valleys Association  
1368 Prizer Road  
Pottstown, PA 19465  
or

Chester County Community Foundation  
28 W. Market Street, West Chester, PA 19382