

IS A TRANSFERABLE ON DEATH (TOD) GIFT RIGHT FOR YOU?

With a TOD gift...



You can continue to use your account during life



You can change your mind at any time



You can leave a legacy

If you have questions or are interested in learning more about TOD gifts, please contact us. We would be happy to assist you and answer any questions that you have.

How Can We Help?

- Please contact me with more information about a transferable on death charitable gift.
- I have already included your organization in my will or trust.
- Please send me your FREE estate planning guide.

The best way to contact me is by:

- Email
- Mail
- Telephone

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.

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Estate and Gift Planning

P.O. Box 1058

Roseville, CA 95678

800-436-2695

mylegacy.amazingfacts.org

mylegacy@amazingfacts.org

A GIFT of a DIFFERENT SORT



Gift of an investment account when it is no longer needed



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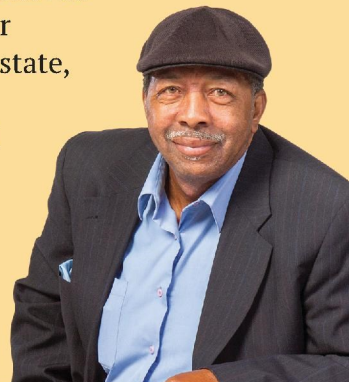
Do you own stocks, bonds or mutual funds? Would you like to make a gift to leave a legacy and support our organization?

If so, consider a transfer on death (TOD) gifting strategy. With a TOD gift, you can name our organization as the primary or contingent beneficiary of the brokerage account upon your passing.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

ADVANTAGES OF TRANSFERABLE ON DEATH CHARITABLE GIFTS

- **SIMPLE**—To make a TOD gift, you simply fill out a brief form provided by your financial or brokerage firm.
- **INEXPENSIVE**—There is no cost to complete the TOD form, and in most cases there are no legal fees, as there is no need to amend your will or trust.
- **REVOCABLE**—You retain complete ownership of the account while you are living, and you can modify or revoke your gift at any time during your life.
- **AVOID PROBATE**—The assets pass directly to our organization without going through the probate process.
- **SAVE TAXES**—The assets will be removed from your taxable estate, saving potential estate taxes.



TOD GIFTS ARE COST EFFECTIVE WAYS TO LEAVE A LEGACY

Ed and Robin wanted to leave a legacy gift that would support our mission and ensure that we remained financially strong well into the future. In talking with their investment advisor about their planning goals, they found a simple solution—use a transfer on death (TOD) form to name our organization as a beneficiary of a large mutual fund in which they were invested.

Because they jointly owned the account, the TOD beneficiary designation would ensure that they could both benefit from the mutual fund during their joint lives and that the survivor of the two of them would continue to own the mutual fund for the rest of the survivor's life. After both pass away, the mutual fund would be transferred to our organization.

Ed told us, “We really liked the idea of a TOD gift! It was simple to set up, and it lets us continue to use the mutual fund to meet our needs in retirement.” We couldn't be happier with this giving strategy!”

