

THE JOHNSON COUNTY
COMMUNITY FOUNDATION
P.O. Box 217
Franklin, Indiana 46131

For Giving, For Good, Forever



A DEFERRED GIFT

The term “planned giving” describes the many ways in which individuals make charitable gifts beyond that which is given on an outright basis. With careful planning, one often can make a much more substantial gift than previously imagined and can often realize substantial tax benefits. Such a legacy can make a significant difference in the Johnson County of tomorrow. There are several common vehicles for planned giving, each providing a distinctive way to shape a substantial gift.

Bequest The donor makes a provision in his or her will for a gift to the Johnson County Community Foundation. This is the simplest form of planned giving.

Charitable Remainder Trust (CRT) The donor uses assets to establish a trust with JCCF as ultimate beneficiary while retaining the income generated by the cash or property given. Such gifts can take many forms, including annuity trusts or unitrusts.

Charitable Gift Annuity The donor makes a gift of assets to a trust and receives an annuity yielding a fixed amount of annual income and names JCCF as ultimate beneficiary. Like a CRT, this vehicle provides life income to the donor and/or annuitant.

Life Insurance The donor names JCCF as the owner and beneficiary of a new or existing policy.

Other forms of giving exist and JCCF is both creative and flexible in accommodating donor needs. Please contact us at 317-738-2213 or jccf.org with any questions.

398 South Main Street • Franklin, IN 46131
phone- 317-738-2213 • fax- 317-738-9113 • website- jccf.org

THE LEGACY SOCIETY

Leave a lasting impression

THE JOHNSON COUNTY COMMUNITY FOUNDATION

Your

COMMUNITY FOUNDATION

possibility & promise

The Johnson County Community Foundation is a public charity established to enhance the quality of life for all citizens of Johnson County, now and for generations to come, by building community endowment, addressing needs through grantmaking, and providing leadership on key community issues.

It does so by attracting gifts and bequests (primarily in the form of permanent endowments). JCCF manages the assets under its control and considers recommendations of donors in making distributions from the earnings of those assets to charitable organizations in Johnson County.

The underlying purpose of an endowed fund is to provide a source of financial support for charities that will grow in perpetuity. The foundation has the professional staff, management experience, sophisticated board supervision and commitment to supporting and enhancing philanthropy and charitable activities throughout Johnson County.

Each endowed fund established in the foundation benefits from the economies of scale of its multimillion dollar holdings, so administrative costs are kept to a minimum. Funds created in the foundation ensure that wealth earned in Indiana remains here and works continually to improve the communities about which we all care.

The Johnson County Community Foundation is one of more than 650 community foundations located across the country and the only such foundation serving a broad range of needs in Johnson County.

A SHARED LEGACY

The Johnson County Community Foundation has been enhancing the lives of Johnson County residents since 1991. As the community trust for Johnson County, the foundation addresses the widest imaginable range of human needs, supporting programs and projects of promise in human services, arts and culture, health, education and the environment.

Many thoughtful and generous individuals have expressed their enduring commitment to our community by making gifts to the foundation, confident that its effective stewardship will yield the greatest possible benefit to the community.

Gifts to the foundation are permanent in nature since the principal is not used in grantmaking. As keeper of an endowment for all of Johnson County, the foundation represents a source of never-ending philanthropy. For this reason, many donors have made gifts to JCCF at their death so their gifts may keep giving forever. These donors may be remembered in perpetuity through their named funds at JCCF.

The Legacy Society has been created to give current recognition to those individuals who plan to make a substantial gift at the end of their lifetimes. The Society recognizes today's generous citizens, who, like many who came before them, will benefit tomorrow's generations.

A copy of the most recent annual report of the Johnson County Community Foundation is available by calling 317-738-2213.

STATEMENT OF INTENT

The Legacy Society provides a way for the Johnson County Community Foundation to recognize generous individuals who have made plans to benefit Johnson County in the future by using the foundation's services. While personal and family obligations should always come first, a planned gift to the foundation is a simple way to create an enduring legacy.

If you have made provisions for a deferred gift to JCCF, please complete this form and return it to the foundation office so we can celebrate you in special publications and events.

Name _____

Address _____

City _____

State _____ Zip _____

Phone _____

Email _____

In recognizing this gift, the foundation is authorized to list the following name/names as members of the Legacy Society (you may remain anonymous):

This *Statement of Intent* is non-binding.

(Signature and Date)

- I/we wish to consider a deferred gift to JCCF and would like to discuss the foundation's services with a JCCF staff member.