



## GIFTS THAT WILL LEAVE A LEGACY

Naming Connor's Heroes Foundation (CHF) as a beneficiary or including CHF in your estate planning may provide tax and financial benefits to you, as well as ensuring a hopeful future for our childhood cancer heroes. CHF will work with your agent, family members, and/or financial institution to fulfill your charitable goals.

### DONOR ADVISED FUNDS (DAFs)

- DAFs are funds with immediate tax benefits. You can grow your assets and distribute the money to an eligible IRS-qualified public charity on your own timeline. CHF has received donations through DAFs such as Community Foundation Richmond, Fidelity Charitable and Schwab Charitable.
- You can authorize your gifts to CHF, Federal Tax ID# 20-4992632.

### BENEFICIARY DESIGNATION FOR IRAS AND OTHER RETIREMENT PLANS

- Your tax-free gift from your IRA can count toward your Required Minimum Distribution. Call your plan administrator to see how you can name CHF as the beneficiary. Use our Federal Tax ID# 20-4992632 in place of a social security number.

### WILLS, BEQUESTS AND LIVING TRUSTS

- Leave CHF in your will by adding one sentence to your will: "I give to Connor's Heroes Foundation, Richmond, VA, Federal Tax ID# 20-4992632 all (or \_\_ % of) the rest, residue and remainder of my estate for its general purposes."

### PLEGGED GIFTS

- You can pledge to make a larger gift and fulfill it over a comfortable pace of your choosing. You can spread payments over a period of time—typically five years or less. You will receive an income-tax deduction for the amount you give each year.

### GIFTS OF SECURITIES

- Donating appreciated securities — stocks, bonds, or mutual funds that have realized significant appreciation over time — is a tax-efficient way to give.
- Since the securities are donated rather than sold, capital gains taxes from the sale may no longer apply.



Connor's Heroes Foundation  
PO Box 5512, Richmond VA, 23220  
(804) 897-1272  
admin@connorsheroes.org

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### LIFE INSURANCE

- This gift is as simple as updating your beneficiary designation form. You can designate CHF as the primary beneficiary for a percentage or specific amount. You can also make CHF the contingent beneficiary so CHF will receive the balance of your policy only if your primary beneficiary does not survive you.
- Make an outright gift of an existing policy. You can name CHF as owner and beneficiary of an existing policy as well as take out a new policy and irrevocably name CHF as owner and beneficiary of the insurance contract.

### BANK ACCOUNTS

- Name CHF as the beneficiary of a bank account.

### BEQUEST INFORMATION

Legal Name: Connor's Heroes Foundation

Mailing Address: PO Box 5512, Richmond, VA 23220

Office Address: 1840 W. Broad Street, Suite 300, Richmond, VA 23220

501(c)(3) non-profit organization. Federal Tax ID# 20-4992632



### TO MAKE YOUR LEGACY GIFT, CONTACT:

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