

Legacy Funds

Donors establish legacy funds to receive assets from a will, trust or retirement beneficiary plan and communicate how their charitable contributions will benefit their favorite causes.

LEGACY FUNDS ARE:

PERSONAL

- Legacy funds are ideal for families and charitable individuals who want to designate how their assets will be distributed after their lifetimes.
- Legacy funds are recognized as named funds of the Community Foundation.

FLEXIBLE

- Legacy funds are easily modified without changing estate documents.

EFFICIENT

- The Community Foundation can receive gifts designated in a will or estate plan including life insurance policies, IRAs, 401(k) plans, real estate, charitable gift annuities and charitable remainder trusts.

FINANCIAL FACTS:

- Legacy funds are free of administrative fees until assets are received.
- Legacy funds can be established for any amount.



COMMUNITY FOUNDATION
for Palm Beach and Martin Counties

Your Philanthropy
Our Community
Better Together

Ten reasons to give through the Community Foundation for Palm Beach and Martin Counties

We are a **local organization** with deep roots in the community.

We have **broad expertise** on community issues and needs.

We provide highly **personalized service** tailored to your charitable and financial interests.

Our funds help people **invest in causes** they care about most.

We accept a wide **variety of assets** and can facilitate the most complex forms of giving.

We partner with **professional advisors** to create highly effective approaches to charitable giving.

We offer maximum **tax advantage** for most gifts under federal law.

We **multiply the impact** of gift dollars by pooling them in professionally managed portfolios.

We build **endowment funds** that benefit the community forever and help create personal legacies.

We are a collaborative **community leader**, coordinating resources to create positive change.

GIVE
at the time of your passing and your estate could receive a tax deduction

Future Contribution

Estate Tax Deduction



GROW
your charitable assets or distribute to charity immediately



Administration

Investments



GRANT
to the causes you care about or name your heirs as successor advisors to your fund



Name Successor Advisors



Charitable Grants

For more information about establishing a fund at the Community Foundation for Palm Beach and Martin Counties contact us at 561.659.6800.



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