

Creating Your Legacy: Donor Advised Funds and Charitable Gift Annuities

Create a legacy that reflects your **personal values** while achieving your financial and **philanthropic goals**. Death with Dignity has a longstanding record of managing donations diligently and strategically to ensure your gift has a **lasting impact**.

DONOR ADVISED FUNDS

We can help you establish a donor advised fund that aligns with your philanthropic vision and helps you avoid significant tax burden. Working with an advisor at a foundation of your choosing, you can set up a fund and contribute stocks, bonds, and other personal assets, receiving the maximum tax deduction the IRS allows. Your irrevocable contributions will be invested, and you will have the opportunity to identify and fund initiatives at Death with Dignity that reflect your priorities.

DONOR STORY: JOYCE AXELROD

Joyce Axelrod created a donor advised fund at the San Diego Jewish Community Foundation that now makes grants to Death with Dignity. Upon her death, Joyce has instructed that the remainder of her advised fund be distributed to Death with Dignity and other charities.

“I believe that people should have the option to die without pain and suffering. I set up a fund through a local community foundation to support this important work. You don’t need to be wealthy to leave a gift in your estate.”

—JOYCE AXELROD, SAN DIEGO, CALIFORNIA

CHARITABLE GIFT ANNUITIES

A charitable gift annuity allows you to make a future gift to Death with Dignity in exchange for lifetime financial benefits.

By establishing a charitable gift annuity through the foundation of your choice, you are creating a contract with a foundation in which you donate cash or other assets to charities of your choice and, in turn, receive an immediate charitable tax deduction and a fixed annual payment for life.

If you would like to explore a charitable gift annuity, start by contacting your favorite community foundation in your state. We can help you identify one, if you would like assistance.

DONOR STORY: MARTIN & BODIL GEROTWOL

Martin and Bodil Gerotwol worked with the Silicon Valley Community Foundation to create a charitable gift annuity to benefit Death with Dignity. They then enjoyed a set amount of income automatically sent to them from the annuity.

When Martin and Bodil died, 60% of the remainder was gifted outright to Death with Dignity and the remaining 40% was placed in a nonprofit endowment fund at the foundation, which will support Death with Dignity in perpetuity.

Together, we can explore how you can create an estate planning strategy that meets your financial priorities, honors your personal values, and reflects your philanthropic **vision**.

RESOURCES

- Find a local community foundation using the Community Foundation Locator online at www.COF.org/community-foundation-locator, or call us to help you in your search.
- The American Endowment Fund is a national public charity and community trust and “the nation’s largest independent provider of donor advised funds.” To learn more visit the website www.AEFonline.org/what-donor-advised-fund.

INFORMATION YOU WILL NEED:

- Organization Name: Death with Dignity National Center
- Address: 520 SW 6th Avenue #1220, Portland, Oregon 97204
- Phone: (503) 228-4415
- Website: www.DeathwithDignity.org
- Tax ID: 93-1162366

TO LEARN MORE, CONTACT:

- Amy Lavan, Leadership Giving Manager
- Phone: (971) 808-2851
- Email: alavan@deathwithdignity.org

This information is not intended as legal or tax advice. For such advice, please consult an attorney or a tax advisor.

