Planned Giving

The Volen Center appreciates your interest in making a beneficiary in a bequest, trust, retirement plan or insurance policy. The Volen Center will honor all requests for anonymity.

Enrollment is simply a matter of providing documentation to the Volen Center upon creation of a legacy gift. Remember you can name the Volen Center as beneficiary for a specific dollar amount or percentage of the estate.

Your planned giving will help the Volen Center sustain an economic base so that its successful programs and services can continue to help our valued seniors.

We are an IRS Code 501(c)(3) nonprofit organization.

Leave a Legacy of Caring

Benefits for the Donor

- Allows you to leave a legacy without interfering with your current economic needs.
- Lets you honor a loved one by helping others in their name.
- Offers you savings on taxes and stock dividends.
- Adds to your investment portfolio.
- Allows you to designate your donation to a specific program or to the Volen Center’s general operations.
- Recognizes the care your loved one received here.
- Contributes to the continuation of much-needed services.
- Gives you the flexibility to designate how and when to give.
- Allows you to designate your property to the Volen Center or exempt from federal gift and estate taxes.
- Charitable gifts may be deductible in computing your federal income and some state income taxes.

Including the Volen Center as a beneficiary in your will or trust can help you make a long lasting gift. And, for many years to come, your aging and disabled populations will receive the care and services through the Volen Center that help them improve and maintain their quality of life. None of us ever know if we will need such services, but we need them here in case we or our loved ones do.

Why Leave a Legacy to the Volen Center?

- Memorializes a loved one.
- Ensures that our aging and disabled populations receive care for many years to come.
- Recognizes the care your loved one received here.
- Provides an easy way to give back without affecting your current standard of living or income flow.
- Saves on taxes and stock dividends.

Whether it is through cash, stocks, bonds, paid-up life insurance, individual retirement account, real estate, or other financial assets, the benefits of a planned gift are immaterial – to both the donor and the Volen Center. They can provide the donor with valuable tax benefits and, in some cases, income for life.

Leaving a Legacy of Love

Finding out how you can give today: please call:

(561) 395-8920 EXT. 216.


PLANNED GIVING COMMIT TO YOUR COMMUNITY

The Volen Center
Together we make community happen.

1515 West Palm Beach Blvd, Boca Raton, Florida 33486 • 1.866.373.1905 • www.volencenter.com

Remember to like the Volen Center on Facebook.

A 501 (c) (3) non-profit organization (Federal EIN:16-3792908) headquartered in Boca Raton, Florida. Founded in 1984, the center serves seniors for adult, long-term care, and single men and women at 12 of 20 locations throughout Southern Palm Beach County.
Ways to Give

Including the Volen Center as a beneficiary in your will or trust can help you make a wonderful gift without affecting your current standard of living or income flow. And, for many years to come, our aging and disabled will receive the care and services that help them improve or maintain their quality of life.

- **Cash**
  You can write a check payable to the Volen Center and designate it for the program or service of your choosing or for general use.

- **A Bequest**
  You may wish to designate a percentage or a fixed dollar amount of your estate to the Volen Center.

- **Life insurance Policy**
  Name the Volen Center as the beneficiary of your life insurance policy.

- **Personal Property**
  You may consider a gift or bequest of personal property such as real estate, other personal tangible property (such as art or jewelry), and intangible property (such as patents, trademarks, and copyrights) and receive tax credit based on a formal appraisal.

- **Stocks or Bonds**
  Securities that have appreciated over the years may be given directly to the Volen Center, thus minimizing capital gains taxes.

- **Charitable Remainder Trust – Income for Life**
  Transfer some assets (stocks, real estate, insurance policies, etc.) to be legally owned by the trust. It’s a good option for those donors who wish to have access to their income or assets for their lifetime, or a certain period of years, but still wants to make that ultimate donation.

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**YOUR GIFT**
REQUEST
OUTRIGHT GIFT OF CASH
OUTRIGHT GIFT OF SECURITIES
OUTRIGHT GIFT OF PERSONAL PROPERTY
GIFT OF RETIREMENT ASSETS
GIFT OF LIFE INSURANCE
CHARITABLE REMAINDER TRUST
CHARITABLE GIFT ANNUITY
CHARITABLE LEAD TRUST

**YOUR GOAL**

- **Defer a gift until after your lifetime.**
- **Make a quick and easy gift.**
- **Avoid tax on capital gains.**
- **Share your enjoyment of a collection or other personal item(s).**
- **Avoid the two-fold taxation on IRAs or other employee benefit plans.**
- **Make a large gift with little cost to yourself.**
- **Secure a fixed and often increased income or create a hedge against inflation.**
- **Supplement income with steady payments that are partially tax-free.**
- **Reduce gift and estate taxes on assets you pass to children or grandchildren.**

**HOW TO MAKE THE GIFT**

- **Name us in your will or living trust.**
  Designate a specific amount, percentage or share of the residue.
- **Simply write a check or make a cash donation now.**
- **Contribute long-term appreciated stock or other securities.**
- **Donate tangible personal property related to our tax-exempt function.**
- **Name us as beneficiary of the remainder of the assets after your lifetime.**
- **Change ownership on a life insurance policy you no longer need.**
- **Create a trust that pays income annually; principal is retained for charitable organization.**
- **Establish a charitable gift annuity contract with us and a legacy foundation that pays a set amount for life.**
- **Create a charitable trust that pays fixed or variable income to us for a specific term of years; principal is retained for your heirs.**

**YOUR BENEFITS**

- **Donation exempt from federal estate tax.**
- **Control of your assets for the rest of your life.**
- **Immediate income tax deduction.**
- **Immediate charitable deduction based on full fair market value.**
- **Charitable deduction for life insurance premiums for the remainder of the policy.**
- **Allows you to make the gift from the most highly taxed assets, leaving better assets for your family.**
- **Current income tax deduction.**
- **Future income tax deduction through gifts to pay premium premium.**
- **Variable or fixed income for life.**
- **Current charitable deduction on income tax.**
- **Current and future deduction on income taxes.**
- **Fixed payments for life for one or two individuals.**

* = Reduces your taxable estate
* = Property left by your family, often with reduced gift taxes

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