

Planned Giving

The Volen Center appreciates your interest in making it 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.

Leaving a Legacy of Love

FIND OUT HOW YOU CAN GIVE TODAY!
PLEASE CALL:

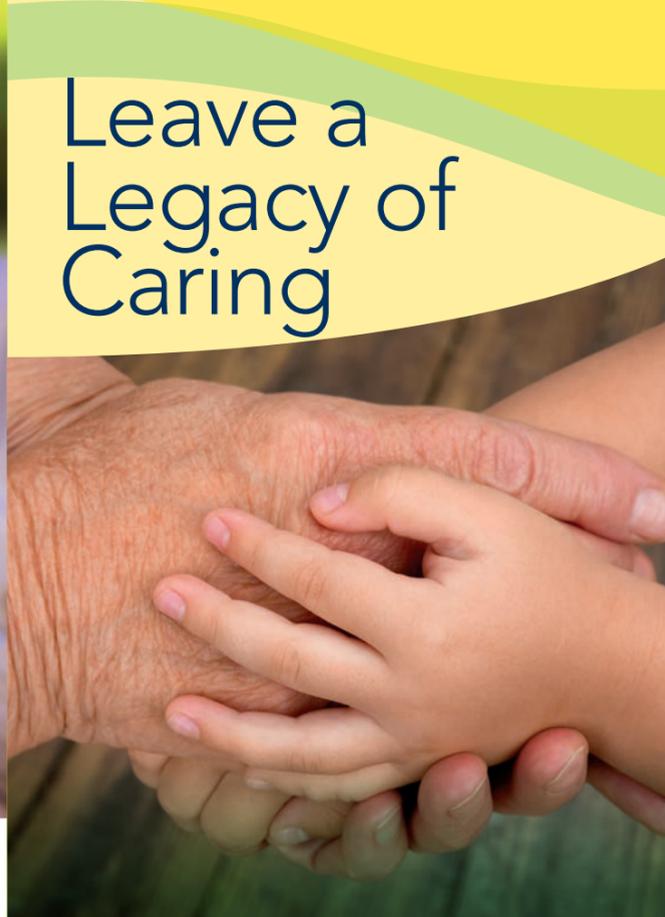
(561) 395-8920 EXT. 216.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING 800-435-7352 TOLL-FREE WITHIN THE STATE OR AT www.freshfromflorida.com/Divisions-Offices/Consumer-Services. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

Why Planned Giving

The Volen Center has been helping to improve the quality of life for seniors and the disabled for more than 40 years. The Center, at its three locations, provides a host of services to help seniors and the disabled avoid social isolation, maintain and improve cognitive functioning, enjoy a variety of activities, eat nutritious meals, and use inexpensive transportation that helps restore or continue independence. It also provides caregivers and families the support they need to help their elderly or disabled loved one, and peace of mind that their loved one is being cared for in a secure environment by trained professionals. High-quality day programs, such as the Volen Center's, save on the higher cost of institutional placement. Planned giving, therefore, offers an economical benefit for years to come. Long-term giving:

- 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.
- Gives you the flexibility to designate how and when to give.
- 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.



Leave a Legacy of Caring

Benefits for the Donor

- Cash gifts, bequests, and devices of property to the Volen Center may be exempt from federal gift and estate taxes.
- Charitable gifts may be deductible in computing your federal income and some state income taxes.

Be sure to consult your attorney or tax adviser regarding your own personal situation as you plan your giving program.

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, our aging and disabled populations will receive the care and services through the Volen Center that help them improve or 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 immeasurable – to both the donor and the Volen Center. They can provide the donor with valuable tax benefits and, in some cases, income for life.



1515 West Palmetto Park Rd., Boca Raton, Florida 33486
t 561.395.8920 toll free 866.711.6872
www.volencenter.com

Remember to like the Volen Center on **facebook**.

The Volen Center is a private 501(c)(3) nonprofit social service agency, headquartered in Boca Raton, Florida. Founded in 1968, the center offers services for older adults, family caregivers, and family members of all ages at locations throughout Southern Palm Beach County.

THE VOLEN CENTER
PLANNED GIVING
COMMIT TO YOUR COMMUNITY



the
volen center
Together we make community happen.

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.

■ Payable On Death (POD) Bank Account

A POD account names the Volen Center as beneficiary of that account upon the death of the account holder.

■ Retirement Plan Assets

Name the Volen Center as beneficiary of your retirement plan.

■ 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.

CHOOSE AN OPTION THAT MATCHES YOUR GOALS

YOUR GIFT	BEQUEST	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; principle 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; principle 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 * Avoidance of capital gains tax	Charitable deduction based on full fair market value	Allows you to make the gift from the most highly taxed assets, leaving better assets for family	* Current income tax deduction * Possible future deduction through gifts to pay policy premium	* Variable or fixed income for life * Immediate income tax charitable deduction	* Current and future savings on income taxes * Fixed payments for life for one or two individuals	* Reduces your taxable estate * Property kept by your family, often with reduced gift taxes