Monica Dickens Legacy Society

Making a Future Legacy Gift to Samaritans

Fifty years ago, Monica Dickens founded Samaritans to prevent suicide and provide hope. You can keep her vision alive and leave a living legacy of your compassion and concern for others. Join the Monica Dickens Legacy Society to help us create a world without suicide and support those grieving a suicide loss.

The Impact of a Legacy Gift

A well-structured charitable plan can:

- Support Samaritans for generations
- Make a bigger impact through a larger gift
- Offer tax advantages to you and your heirs

How to Make a Legacy Gift to Samaritans

The simplest way to make a legacy gift is through your will or by designating Samaritans as a beneficiary of your retirement plan, life insurance policy, or bank account. Turn over this page for an introduction to different charitable giving strategies, including some of the financial and estate-planning issues associated with them.**Learn more at samaritanshope.org/MDLS**

Making a Decision to include Samaritans in Your Estate Plans is a Very Personal Choice

As you view your estate planning needs, feel free to call Samaritans Senior Director of Major and Planned Gifts Rebecca Allen to discuss your plans rallen@samaritanshope.org.

An Introduction to Planned Gifts

The following is an introduction to charitable giving strategies for legacy giving.

Bequests

A quick call to your attorney or financial planner is all you need to make a charitable gift through your will. Donations often include various types of assets, such as cash and securities. In your will, you can specify a dollar amount, percentage of your estate, or the residual of the estate, as well as make the gift contingent on specific future events. Below are two examples of types of bequests and sample language for your will.

Outright Bequest

I give, devise and bequeath $###, XX% or [name specific asset] to Samaritans, Inc., a 501(c)(3) charitable corporation (Tax ID number 04-2643466) with offices at 41 West Street, 4th Fl. Boston MA 02111.

Contingent Bequest or Trust Gift

In the event of the death of any of the beneficiaries, I give, devise and bequeath XX% of the rest, residuary and remainder to Samaritans, Inc., a 501(c)(3) charitable corporation (Tax ID# 04-2643466) with offices at 41 West Street, 4th Fl. Boston MA 02111.

Life Insurance, Retirement, and Bank Accounts

Retirement assets such as an IRA or 401(k) are taxable to your heirs. As a non-profit, Samaritans wouldnot pay taxeson funds from a retirement account. Naming Samaritans as a beneficiary on your life insurance benefits is another way to support our future. A paid-up policy could also be transferred to Samaritans for an immediate income tax deduction. The benefit of using **life insurance** is that it provides leverage when gifting, which makes it possible to gift a significant amount at a relatively small cost. **Bank and brokerage accounts** can also name Samaritans as a beneficiary and would not need to go through the probate process.

Naming Samaritans as a beneficiary is simple:

- Contact your life insurance company, retirement plan, or financial institution for a change of beneficiary form.
- Complete the form designating what percentage of the assets you wish to contribute to Samaritans as a primary or secondary beneficiary.
- Return the form to your institution. You can share a copy with us to help ensure the plan is completed.

Annuities & Trusts

Annuities and trusts offer tax advantages for you and your heirs and can provide income and support foryourself or a designated beneficiary. Talk with your attorney or financial planner about the tax advantages and income producing options that make sense for you. Examples:

- Charitable Remainder Trust (CRT) – a tax-advantaged vehicle that enables you, as donor, to give to Samaritans, diversify assets and receive annual payouts.
- Charitable Lead Trusts – You would fund the trust, preferably with an asset expected to appreciate; Samaritans receives a fixed annual payout from the trust; and the remainder goes to your beneficiaries at the end of the payout term.
- Charitable Gift Annuity – a special type of agreement designed to provide you with the benefits of a traditional annuity while giving the underlying asset to Samaritans.

This information is not legal or tax advice. We recommend that you talk with an attorney and/or financial planner before including Samaritans in your estate plan.