TAKE ACTION TODAY
To leave a legacy for tomorrow.
WHY CHOOSE COMMUNITY FOUNDATION BOULDER COUNTY FOR YOUR PLANNED GIVING?

We’ve come to know that many Boulder County residents want to leave a legacy of giving beyond their lifetimes—for generations to come. People who love this community have committed more than $35M with Community Foundation Boulder County through bequests or other planned gifts. The foundation is uniquely equipped to steward gifts to address single or multiple issues, organizations, and geographies, as well as to track emerging needs and opportunities. We will help you realize your intentions and ensure your legacy of generosity. Through the foundation you can:

• Allocate your gift to one of our endowed funds supporting our initiatives or funding areas building a more vibrant Boulder County. Examples include helping close the achievement gap and improving opportunities for local youth, LGBTQ, and Latino residents.

• Create an endowment that permanently responds to a cause you’re passionate about.

• Designate an unrestricted gift to the Community Foundation.

“We know the foundation is “in it” for the long haul. We wanted to start something that would continue to pay dividends for many years to come. It was an easy decision to support our community through the Community Foundation. And it’s really changed the focus and the energy of our lives, while we’re still here.”

~ Jennie Arbogash, Longmont, Legacy Society Member
WHY START PLANNING NOW?

Planned giving means providing for a future gift to causes or nonprofit organizations through your financial or estate plans. Where do your charitable dollars go now? What causes or nonprofit organizations matter to you? With a little planning now, the difference you make can continue — after your lifetime. And, there are benefits to you by organizing your legacy now.

Take control
Starting now ensures an understanding of your giving goals so your intentions will be properly upheld and uplifted after your lifetime.

Ensure your impact
Choose a philanthropic partner—such as Community Foundation Boulder County—whose job is to know about this community’s needs and opportunities. By becoming involved with us now, you can learn how we keep ourselves knowledgeable and how we would make sure your dollars always have an impact.

Engage and have fun
While your planned gift won’t be realized until later, there will be many occasions to engage with your community now—and to see all of the ways your gift will make a difference tomorrow.

Connect with other community-minded individuals
Getting started now can put you in touch with people who share your interests and values. For example, when you let the foundation know about your future gift, you’ll become a member of our Legacy Society. You’ll be invited to special events, and you’ll be deservedly recognized in foundation communications (unless you prefer anonymity).
How to Get Started

1. Review Types of Planned Gifts

This brochure and our website highlight ways you can make a planned gift.

commfound.org/giving/planned-giving/ways-give

Types of Planned Gifts

- Bequests
- Charitable Remainder or Lead Trusts
- Life Insurance, Retirement Plans, or Annuities
- Real Estate or Business Interests

“We want all the wonderful programs and services in our county to stay in place so that our kids and future generations of kids can benefit from them, too.”

~ Carly Brantz, Boulder, Legacy Society Member
BEQUESTS

Consider leaving assets to the Community Foundation, or to a specific fund at the foundation, by naming the foundation in your will or trust.

How it works:

• Name Community Foundation Boulder County, a Donor-Advised Fund, or another fund of the foundation as a beneficiary in your estate. The foundation has a number of funds that are a permanent resource for funding general or specific philanthropic interests within the community.
• Community Foundation Boulder County can be named to receive a specific amount (the sum of $____), a specific asset, a percentage of your estate (______percent of my estate), or the remainder of your estate (the residuary of my estate).
• Sample language: Make your bequest to “Community Foundation Boulder County, a charitable organization located in Boulder, CO, with the Federal Tax Identification Number 84-1171836.”

LIFE INSURANCE, RETIREMENT PLANS, OR ANNUITIES

Consider providing ongoing support for the community you love by naming Community Foundation Boulder County as a beneficiary of your life insurance, retirement plan (a particularly tax-wise gift) or annuity.

How it works:

• Name Community Foundation Boulder County as a beneficiary of your insurance policy, retirement plan or annuity. We’re available to assist you and your advisors in this process.
• The foundation uses assets to fulfill your charitable intent, whether for general community support, ongoing funding in a particular area of interest, or through a Donor-Advised Fund.
CHARITABLE REMAINDER OR LEAD TRUSTS

Consider working with your attorney to establish a charitable remainder or lead trust to make a significant tax-deductible gift to Community Foundation Boulder County. These trusts offer a way to receive income or maintain an interest in a trust, but also actualize charitable goals within the foundation.

How it works:

• When your trust ends, the principal of a remainder trust remains at the foundation; the principal of a lead trust is returned to your family or other designated beneficiaries.
• Work with us and your own advisors to create a trust that reflects your unique needs and wishes.
• Receive tax benefits, while income from the trust is directed to you or the foundation – depending on which type of trust you choose.

REAL ESTATE OR BUSINESS INTERESTS

Consider making a gift of real estate, business interests or other assets to Community Foundation Boulder County. Not only are there often tax advantages in doing so, but you’ll also be supporting our mission to improve the quality of life for everyone in Boulder County – for generations to come.

How it works:

• Leave a permanent legacy to benefit Boulder County in a general way, or set up your gift to fund a specific area of interest.
• Discuss your plans with the foundation to make sure we can accept the specific gift.
Learn more about your planned giving options and how to involve your loved ones in giving before passing your legacy on to them. Contact us at PhilanthropicServices@commfound.org or 303.442.0436

2 TALK TO YOUR PROFESSIONAL ADVISOR

If you work with an estate planning attorney, financial advisor, or CPA, we encourage you to speak with your advisors to choose planned giving options that will best suit your financial goals.

3 CONTACT A MEMBER OF OUR PHILANTHROPIC SERVICES TEAM

We’ll work with you to organize a plan that achieves your goals. If your plan is already set, it’s helpful for us to know you’ve included Community Foundation Boulder County so that we can include you in our Legacy Society.