

You *Can* Make a Difference

(yes, we're talking to You)

Bequests

The simplest way to leave a planned gift to benefit our community is to make a bequest including specific language in your will or living trust naming Barberton Community Foundation as the recipient of a testamentary gift. Your will or living trust can include gifts in the form of cash, securities or personal property. You may contribute a specific dollar amount, a percentage of your estate or the residual of your estate in this manner. Your estate will receive a charitable deduction for the full donation, so your heirs will not pay estate tax on these assets. The community foundation is happy to provide sample language to include in your will or trust, as well as guidance and a thorough review of our policies regarding such a gift.

Retirement Plan Donations

Naming Barberton Community Foundation as a beneficiary of your retirement funds, such as an IRA, 401k or 403b, is a simple and effective way to benefit the community while avoiding significant, often unanticipated tax penalties. Your retirement plan is tax-deferred only until death. The remainder of these assets are subject to multiple taxes when included in your estate, resulting in a tax rate of 60 percent or more. Donating retirement accounts can reduce or eliminate these taxes completely and make a significant impact on the community.

Leave Your Legacy

Individuals, families, businesses can create permanent charitable funds to benefit Barberton. The Foundation has more than 30 funds that donors may also target. These funds benefit an array of civic, educational, recreational and social endeavors. Call (330) 745-5995, write to us at 460 W. Paige Ave., Barberton, OH 44203 or log on to www.bcfcharity.org for more information.



You *Can* Make a Difference

(and We can help)

Charitable Remainder Trust

By transferring assets to establish a Charitable Remainder Trust, you receive an immediate tax deduction and lifetime income for you or your named beneficiary. You also reduce or avoid capital gains taxes associated with the gifted asset. Eventually, when the trust's term is complete, the remaining assets pass on to the community foundation. The community foundation will accept gifts from a variety of CRTs including standard unitrusts, net income unitrusts, net income with a makeup provision unitrusts, and charitable remainder annuity trusts. Barberton Community Foundation has the capacity and expertise to act as trustee.

Charitable Lead Trust

When you create a Charitable Lead Trust, the CLT makes regular income-tax-deductible gifts to the community foundation as the income beneficiary. When the trust terminates, the entire principal is returned to you or to your family.

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