



## SMALL EFFORT. BIG DIFFERENCE.

**Have you ever wished you could help,  
but thought you couldn't afford to give?**

There are ways you can give today while still preserving your assets for retirement and providing for your family. Just a small effort on your part can make a big difference to your community.



Nebraska Community Foundation unleashes abundant local assets, inspires charitable giving and connects ambitious people to build stronger communities and a Greater Nebraska.

Headquartered in Lincoln, the Foundation serves communities, donors and organizations by providing financial management, strategic development, education and training to a statewide network of 1,500 volunteers in more than 250 communities.

We would be happy to meet with you and your professional advisor to discuss your charitable gift planning ideas.

**Please contact us for more information.**

The Office of Gift Planning  
Nebraska Community Foundation  
402.323.7330  
info@nebcommfound.org  
nebcommfound.giftlegacy.com



Excellence. Accountability. Impact.™

### Committed to Quality and Accountability

Nebraska Community Foundation is confirmed in compliance with National Standards for U.S. Community Foundations as established by the Council on Foundations. This means that NCF meets the nation's highest philanthropic standards for operational quality, integrity and accountability.

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## BENEFICIARY DESIGNATION GIFTS



*Easy, affordable ways to give back*



## A CHARITABLE BENEFICIARY DESIGNATION GIFT



**SIMPLE** – To make a charitable beneficiary designation, you fill out a beneficiary change form naming your community’s affiliated fund as a beneficiary.

**INEXPENSIVE** – There is no cost to complete a beneficiary change form. It is important to coordinate the change with your will or trust.

**REVOCABLE** – You retain complete ownership of your asset while you are living, and you can modify or revoke your gift at any time during your life.

**AVOIDS PROBATE** – The designated assets pass directly to Nebraska Community Foundation without going through the probate process.

**SAVES TAXES** – The gifted assets will be removed from your taxable estate, saving potential estate and income taxes.

Please contact us to learn more about these types of charitable beneficiary designation gifts and how you can make a lasting impact on your community.

## IT’S AS EASY AS COMPLETING A SIMPLE FORM

**GIFTS OF RETIREMENT PLANS** The benefit of designating Nebraska Community Foundation or one of our affiliated funds as a beneficiary of your retirement plan is twofold: it protects your heirs from unnecessary estate and income taxes, plus retirement savings are considered one of the smartest, tax-wise ways to give.

**LIFE INSURANCE** If you have a life insurance policy, you can consider maintaining your existing policy during your lifetime and naming Nebraska Community Foundation or an affiliated fund as a beneficiary. Your insurance company can provide you with a form that will allow you to name a charity as sole beneficiary or a beneficiary of a portion of the proceeds.

**ANNUITIES** Naming Nebraska Community Foundation or an affiliated fund as a beneficiary of an annuity is another easy way to give back to your community and includes tax benefits similar to a gift of retirement assets. You can continue to benefit from these assets during your lifetime, and the beneficiary designation can be changed at any time.

**STOCKS, BONDS AND MUTUAL FUNDS** With a “Transfer on Death” (TOD) gifting strategy, you can name Nebraska Community Foundation or an affiliated fund as the primary or contingent beneficiary of the brokerage account upon your passing. There are no costs involved, the TOD is revocable, and it passes directly to NCF outside the probate process.

**CHECKING, SAVINGS AND CERTIFICATES OF DEPOSIT** Another easy, no-cost, and smart way to make a charitable beneficiary designation is through a “Payable on Death” (POD) gift. All you need to do is complete a brief form designating NCF or an affiliated fund as a beneficiary. With a POD, your accounts will pass directly to NCF without going through the probate process.

**DONOR-ADVISED FUNDS** If you have established a donor-advised fund with a financial institution, you may list Nebraska Community Foundation or an affiliated fund as a beneficiary of the fund. The donor-advised fund’s sponsoring organization can provide you with a form to name a charity as sole beneficiary or a beneficiary of a portion of the proceeds.

