



The Legacy Fund is a permanent endowment fund held by one of our region's most trusted philanthropic partners, The Columbus Foundation. The fund is invested carefully, so that it will grow over time. Each year, The Legacy Fund board allocates a percentage of the endowment to nonprofit organizations and to aspiring college students.

The Legacy Fund

of The Columbus Foundation

TheLegacyFund.org / 614.251.4000
1234 East Broad Street, Columbus, OH 43205



Together,
We Can
Build a Stronger
Legacy for the
Central Ohio
LGBTQIA
Community.

The Legacy Fund
of The Columbus Foundation

Support The Legacy Fund with a Planned Gift.

The Legacy Fund of the Columbus Foundation is a unique endowment created by and for the Central Ohio LGBTQIA Community.

With the advice of trusted community leaders, The Legacy Fund:

- Makes strategic grants to help organizations that share our values become financially sustainable and achieve programmatic excellence.
- Funds scholarships to help LGBTQIA college students achieve their academic and vocational goals.
- Seeks permanent, planned gifts, so today's donors help to ensure that the LGBTQIA community can face any challenges that confront it now and for generations to come.

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PAST GRANT
RECIPIENTS
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How Can You Make a Planned Gift?

Anyone can make a planned gift to support The Legacy Fund. You don't have to be wealthy or savvy about money. You just need to plan ahead. Here are some of the ways you can ensure our legacy of serving the LGBTQIA community:

Designate Us as a Beneficiary

Do you have a retirement plan – perhaps through your employer? Or an IRA, 401K, or 403 B? You can make The Legacy Fund a beneficiary of your IRA, 401 K, 403 B or other retirement plan.

A beneficiary is the person (or organization) who receives the assets of the retirement plan. Ask your HR office or financial advisor for a simple form that will name The Legacy Fund—or any organization— a full or partial beneficiary. In many cases, these plans are highly taxed at death, leaving little for partners or family members. Designating The Legacy Fund as a beneficiary may reduce those taxes.

A Bequest in Your Will

You may make a bequest to The Legacy Fund in your will. The bequest may be for a specific amount of money, or it may identify a percentage of the estate to go to The Legacy Fund. Such a bequest may in some cases reduce the amount of estate taxes owed.

Make a Bequest to The Legacy Fund

The following is language suggested by The Columbus Foundation and The Legacy Fund as appropriate to make a bequest in a will to The Legacy Fund:

I give and bequeath to The Legacy Fund of the Columbus Foundation the sum of \$ (amount) or (percent) % of my estate, or all the residue of my estate, real or personal, which I own at the time of my death or over which I have the power of disposition. The Columbus Foundation shall make distributions therefrom in accordance with the provisions of the Amended Articles of Incorporation of the Columbus Foundation of Columbus, Ohio and any amendments or additions thereto at any time made. Disbursements shall also be in accordance with the stipulations of the originating document of The Legacy Fund.

Donate Your Life Insurance

You may also make The Legacy Fund a beneficiary or contingent beneficiary of your life insurance policy. This is often an easy and inexpensive way to leave a legacy. If you have a life insurance policy with a cash value, you might consider making The Legacy Fund the owner of the policy. You receive a tax deduction for the value of the policy, and payments you make to us to pay the ongoing premiums are also tax deductible.

Open a Charitable Gift Annuity

For persons over 60, a Charitable Gift Annuity is a way to guarantee an income and benefit The Legacy Fund at your death. You give money to The Columbus Foundation, and based upon your age and set formulas, you receive an annual income. You receive a tax deduction, and a portion of your annual payment will likely be tax-free. At your death, the remainder of the annuity is given to The Legacy Fund.

Why Support The Legacy Fund?

Your gift will sustain the programs that help LGBTQIA people in Central Ohio thrive. You can designate your gift to fund scholarships, community grants, or to build the capacity of The Legacy Fund and the organizations we serve. Or you can allow the board of The Legacy Fund to allocate it to our community's greatest needs.

All donors who tell us they have made a planned gift of any size to The Legacy Fund become guardians of our community's future will receive special invitations, information, and briefings. You are encouraged to consult your own financial and/or legal advisors to discuss the best way to make a charitable gift while realizing your tax and estate goals.

To explore options on making a donation to The Legacy Fund, contact Steven Moore at 614.251.4000 or SMoore@columbusfoundation.org.

