

Planned Giving



The term “planned giving” refers to charitable gifts that require some planning before they are made. Planned gifts are popular because they offer an opportunity for an individual to make a statement of values with a gift and concurrently enjoy valuable tax benefits and/or income for life.

Our experts are ready to help.

“We are all very different, but yet we are so similar. Together we authored books, led organizations and won national championships. We are all retired. We are all very proud of the contributions we made to our professions during our careers. And we are just feisty enough to want our lifework to turn into a legacy.”

Planned Giving Committee

Millie Barnes
Donna Dubbelde
Judi Garman
Pat Lamb
Carole Mushier
Marcia Saneholtz

The Championship Club

The below Championship Club members have designated the Women’s Sports Foundation as a beneficiary of cash, securities, insurance policies or other resources within a will or via bequest.

The Foundation works with the donor’s financial advisor or provides expert assistance to establish a charitable gift annuity or other planned giving vehicle with significant tax benefits to the donor.

The following planned giving experts have volunteered to offer their assistance to our donors and friends as they fit the appropriate planned giving vehicle to their individual profile. To be part of the legacy, please call the Development Office at 1-800-227-3988 or e-mail PlannedGiving@WomensSportsFoundation.org for more information.

Philip Beekman, Owl Hollow Enterprises Inc. (FL)
Douglas Brown, The Advisors Group of Chicago, LLC (IL)
Catherine Chen & Maryann Simpson, SRI Wealth Management Group (CA)
Deborah Copeland, CLU, ChFC, New York Life Insurance Company (TX)
Renee Evangelista, Edwards Angell Palmer & Dodge LLP (RI)
Donna H. Goldman, CFP, Smith Barney Citigroup (NY)
Amy Jamrog, CLU, ChFC, Northwestern Mutual Financial Network (MA)
Cory Little, Private Banking & Investment Group, Merrill Lynch (MA)
Carol Meyer, Merrill Lynch The Meyer Group (TX)
James E. Meyer, Partner, Greco Planning, Inc. (NY)
Joan Norton, CMFC, RFC, LLC, Independent Financial Advisor (MA)
Sue Riley, Merrill Lynch (CA)

*Anonymous (5)
Beverly Adams
Karen Ansis
Eva Auchincloss
Susan Bassett
Philip Beekman
Cynthia Blaschak
Phyllis Blatz
Betsy Bombeck
Lila Bowers
Cecile Broeren*

*Gigi Brown
Barbara Jean Buchan
George C. Casey
Carol Christensen
Joanna Commander
Kelley Cornish
Andra Christine Douglas
Linda Driscoll
Donna L. Dubbelde
Vickie Dugan
Susan Enquist
Karen Fox
Lauren D. Frank*

*Judi Garman
Pam Gerber
Jacalyn S. Grabbert
Christine Grant
Melinda Greig
Nancy Grigor
Ele Hansen
Yolanda Jackson
Bev Johnson
Joan Johnson
Karen M. Johnson
Billie Jean King
Ilana Kloss
Darlene A. Kluka*

*Kathleen Kunkler
Mary E. Kvamme
Pat Lamb
Soosie Lazenby
Nona M. Lee
Sara Jo Light
Luella J. Lilly
Donna A. Lopiano
Sue Macy
Julia Malpass
Jody Marten
Amy McGliachy
Darla Moldenhauer
Lee Morrison*

*Barbara Muirhead
Carole Mushier
Carole A. Oglesby
Kathryn Olson
Joan Parker
Arden Peck
Dorothy M. Rehill
The Estate of Brenda Reilly
Maria Rodriguez
Patsy Rogers
Nina Rumbough
Chris Sabonis
Joan Schroeder
Tuti B. Scott*

*Jeri Shepard
Reba Sims
Suzanne Slonim
Marjorie Snyder
Ellen Stein
Susan Stigen
Gloria Stratton
Beverly Stunden
The Estate of Janet Swanson
Sharon E. Taylor
Karen Tessmer
Stephanie Tolleson
Susan S. True*

*Hollister W. Turner
Sandra L. Vivas
Chris Voelz
Linda Vollstedt
Victoria Wallace
Madeline Weinstein
Sue Wellington
Judy Wood
Shelley Worsham
Frank and Kristien Ziska
Jo Ann Zwanziger*



Eisenhower Park, 1899 Hempstead Tpke Ste 400, East Meadow, NY 11554 — phone: 516-542-4700
infoline: 800-227-3988 — fax: 516-542-4716 — info@WomensSportsFoundation.org — WomensSportsFoundation.org

Planned Giving

page 2

Knowing that there are hundreds of men and women in the position to give the gift of longevity, we ask you to evaluate your passions, and as you begin to make plans for the future, consider leaving a legacy for the future of girls in sports via a planned gift. Your gift will assist the Women's Sports Foundation in continuing to provide opportunities for women and girls in sport.

By including the Women's Sports Foundation in your estate plan, you will ensure that the Foundation can continue to do advocacy work for women in sports. Additionally, your bequests will help guarantee that young girls of the future will have the opportunities and resources available to allow them to live active and healthy lives.

Match Your Giving Options To Your Goals

| Your Goal | Your Gift | Your Benefits | How to Make the Gift |
|---|---|--|---|
| Defer a gift until after your lifetime. | Bequest | <ul style="list-style-type: none"> • donation exempt from federal estate tax • control of your assets for your lifetime | Name the Foundation in your will or living trust. (Designate a specific amount, percentage or share of the residue.) |
| Make a quick and easy gift. | Outright Gift of Cash | <ul style="list-style-type: none"> • immediate income tax deduction • removal of property from estate | Simply make a gift by check, cash, credit card or matching gift by mail, phone or online. |
| Avoid tax on capital gains. | Outright Gift of Securities | <ul style="list-style-type: none"> • immediate charitable deduction • avoidance of capital gains tax | Contribute long-term appreciated stock or other securities. |
| Share your enjoyment of a collection or other personal item. | Outright Gift of Personal Property | <ul style="list-style-type: none"> • charitable deduction of full fair market value | Donate tangible personal property related to our tax-exempt function. |
| Avoid the twofold taxation on IRAs or other employee benefit plans. | Gift of Retirement Assets | <ul style="list-style-type: none"> • effective reductions of tax impositions on retirement assets that have been growing tax-free | Name the Foundation as beneficiary of the remainder of the assets after your lifetime. |
| Make a gift of property no longer needed and generate an income tax deduction. | Gift of Real Estate | <ul style="list-style-type: none"> • immediate income tax deduction • reduction or elimination of capital gains tax | Donate the property to the Women's Sports Foundation. |
| Make a large gift with little cost to yourself. | Gift of Life Insurance | <ul style="list-style-type: none"> • current income tax deduction • possible future deductions through gifts to pay policy premium | Change ownership on a life insurance policy you no longer need. |
| Secure a fixed and often increased income, or create a hedge against inflation. | Charitable Remainder Trust | <ul style="list-style-type: none"> • variable or fixed income for life • immediate income tax charitable deduction | Create a trust that pays income annually; principal is retained for the Women's Sports Foundation. |
| Supplement income with steady payments that are partially tax-free. | Charitable Gift Annuity | <ul style="list-style-type: none"> • current and future savings on income taxes • fixed payments for life for one or two individuals | Establish a charitable gift annuity contract with the Foundation that pays a set amount for life. |
| Reduce gift and estate taxes on assets you pass to children or grand children. | Charitable Lead Trust | <ul style="list-style-type: none"> • reduction of your taxable estate • property kept by your family, often with reduced gift taxes | Create a trust that pays fixed or variable income to the Foundation for a specific term; principal is retained for heirs. |