

## Planned Giving

### Match Your Giving Options to Your Goals

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.

#### Planned Giving Committee

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

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.

#### Championship Club

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 800.227.3988 or e-mail [PlannedGiving@WomensSportsFoundation.org](mailto:PlannedGiving@WomensSportsFoundation.org) for more information.



*Our experts can help determine the right planned giving option for you.*

Philip Beekman, Owl Hollow Enterprises Inc. (Fla.)

Douglas Brown, The Advisors Group of Chicago, LLC (Ill.)

Catherine Chen & Maryann Simpson, SRI Wealth Management Group (Calif.)

Deborah Copeland, CLU, ChFC, New York Life Insurance Company (Texas)

Renee Evangelista, Edwards Angell Palmer & Dodge LLP (R.I.)

Donna H. Goldman, CFP, Smith Barney Citigroup (N.Y.)

Amy Jamrog, CLU, ChFC, Northwestern Mutual Financial Network (Mass.)

Cory Little, Private Banking & Investment Group, Merrill Lynch (Mass.)

Carol Meyer, Merrill Lynch The Meyer Group (Texas)

James E. Meyer, Partner, Greco Planning, Inc. (N.Y.)

Joan Norton, CMFC, RFC, LLC, Independent Financial Advisor (Mass.)

Sue Riley, Merrill Lynch (Calif.)

## Championship Club members

Anonymous (5)	Linda Driscoll	Ilana Kloss	Carole A. Oglesby	Gloria Stratton
Beverly Adams	Donna L. Dubbelde	Darlene A. Kluka	Kathryn Olson	Beverly Stunden
Karen Ansis	Vickie Dugan	Kathleen Kunkler	Joan Parker	The Estate of Janet Swanson
Eva Auchincloss	Susan Enquist	Mary E. Kvamme	Arden Peck	Sharon E. Taylor
Susan Bassett	Karen Fox	Pat Lamb	Dorothy M. Rehill	Karen Tessmer
Philip Beekman	Lauren D. Frank	Soosie Lazenby	The Estate of Brenda Reilly	Stephanie Tolleson
Cynthia Blaschak	Judi Garman	Nona M. Lee	Maria Rodriguez	Susan S. True
Phyllis Blatz	Pam Gerber	Sara Jo Light	Patsy Rogers	Hollister W. Turner
Betsy Bombeck	Jacalyn S. Grabbert	Luella J. Lilly	Nina Rumbough	Sandra L. Vivas
Lila Bowers	Christine Grant	Donna A. Lopiano	Chris Sabonis	Chris Voelz
Cecile Broeren	Melinda Greig	Sue Macy	Joan Schroeder	Linda Vollstedt
Gigi Brown	Nancy Grigor	Julia Malpass	Tuti B. Scott	Victoria Wallace
Barbara Jean Buchan	Ele Hansen	Jody Marten	Jeri Shepard	Madeline Weinstein
George C. Casey	Yolanda Jackson	Amy McGliachy	Reba Sims	Sue Wellington
Carol Christensen	Bev Johnson	Darla Moldenhauer	Suzanne Slonim	Judy Wood
Joanna Commander	Joan Johnson	Lee Morrison	Marjorie Snyder	Shelley Worsham
Kelley Cornish	Karen M. Johnson	Barbara Muirhead	Ellen Stein	Frank and Kristien Ziska
Andra Christine Douglas	Billie Jean King	Carole Mushier	Susan Stigen	Jo Ann Zwanziger

## 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.	<b>Bequest</b>	<ul style="list-style-type: none"> <li>• donation exempt from federal estate tax</li> <li>• control of your assets for your lifetime</li> </ul>	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.	<b>Outright Gift of Cash</b>	<ul style="list-style-type: none"> <li>• immediate income tax deduction</li> <li>• removal of property from estate</li> </ul>	Simply make a gift by check, cash, credit card or matching gift by mail, phone or online.
Avoid tax on capital gains.	<b>Outright Gift of Securities</b>	<ul style="list-style-type: none"> <li>• immediate charitable deduction</li> <li>• avoidance of capital gains tax</li> </ul>	Contribute long-term appreciated stock or other securities.
Share your enjoyment of a collection or other personal item.	<b>Outright Gift of Personal Property</b>	<ul style="list-style-type: none"> <li>• charitable deduction of full fair-market value</li> </ul>	Donate tangible personal property related to our tax-exempt function.
Avoid the twofold taxation on IRAs or other employee benefit plans.	<b>Gift of Retirement Assets</b>	<ul style="list-style-type: none"> <li>• effective reductions of tax impositions on retirement assets that have been growing tax-free</li> </ul>	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.	<b>Gift of Real Estate</b>	<ul style="list-style-type: none"> <li>• immediate income tax deduction</li> <li>• reduction or elimination of capital gains tax</li> </ul>	Donate the property to the Women's Sports Foundation.
Make a large gift with little cost to yourself.	<b>Gift of Life Insurance</b>	<ul style="list-style-type: none"> <li>• current income tax deduction</li> <li>• possible future deductions through gifts to pay policy premium</li> </ul>	Change ownership on a life insurance policy you no longer need.
Secure a fixed and often increased income, or create a hedge against inflation.	<b>Charitable Remainder Trust</b>	<ul style="list-style-type: none"> <li>• variable or fixed income for life</li> <li>• immediate income tax charitable deduction</li> </ul>	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.	<b>Charitable Gift Annuity</b>	<ul style="list-style-type: none"> <li>• current and future income tax savings</li> <li>• fixed payments for life for one or two individuals</li> </ul>	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.	<b>Charitable Lead Trust</b>	<ul style="list-style-type: none"> <li>• reduction of your taxable estate</li> <li>• property kept by your family, often with reduced gift taxes</li> </ul>	Create a trust that pays fixed or variable income to the Foundation for a specific term; principal is retained for heirs.

### Women's Sports Foundation

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