



Smart Giving: Retirement Assets

Would you like to be able to make a significant gift to a charity and/or fund that could benefit you and your heirs, as well as solve some of your financial, tax and estate planning challenges? We can show you how!

For example, you can use your TIAA-CREF or other qualified retirement plans to make a modest, revocable designation to any charity or charities dear to your heart. Retirement plans are the most expensive asset for family to inherit. Depending on what you own, you may lose 80% of the plan balance to income and estate taxes, both state and federal. If everyone designated a modest percentage - even as low as 1 to 2 % of their retirement assets - to church or charity, our community would be forever changed.

Giving to charity in this manner is easy and revocable. Simply obtain a change of beneficiary form from your pension plan administrator. Complete the form, naming percentages for one or more charities and family members as beneficiaries, and return it to the appropriate office. TIAA-CREF change of beneficiary forms are available online at www.tiaa-cref.org. If you would like to learn more about this type of gift or gifts that could provide you income for life, please contact Elaine Peck at 765-653-4978 or toll free at 866-653-4978. Also, go to www.pcfoundation.org.

The Community Foundation encourages you to always consult your financial advisor and/or attorney when making a planned gift.



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