



BENEFITS OF MEMBERSHIP

As a member of the Key Circle, you can participate in the Foundation's future growth and assist homeless Hoosiers in perpetuity. In addition to personal satisfaction from your philanthropy, you will receive the following benefits:

- With your permission, your name will be included as a Key Circle member in Foundation publications and donor signage.
- A REALTOR® Foundation lapel pin.
- Invitations to gatherings of Key Circle members, hosted by the Foundation and MIBOR leadership.



The REALTOR® Foundation
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317/956-5255
www.realtorfoundation.org

WHAT WILL YOUR LEGACY BE?

Note: This brochure has been prepared as an informational guide only. The contents are not intended as legal advice to donors or potential donors on their personal gift and estate planning. Please seek your independent counsel for applicability of these principles to your personal circumstances.



ENSURING THE FUTURE

The growth of the endowment is critical to the long term sustainability of The REALTOR® Foundation's grant making. An endowment functions as a special type of permanent savings account. The principal of the account is never spent, while the investment income is available to support the general operations of the Foundation, including grants. Endowment funds are a critical source of support for a nonprofit organization, like The REALTOR® Foundation. Indeed, fundraising for endowment is as critical to the long term success of the Foundation as fundraising for annual operating costs or special events. Annual fundraising efforts have allowed the Foundation to maintain its annual grant making at a minimum of \$100,000 each year. But the need is far greater—and growing. In order to make the greatest impact while planning for the future, the Foundation aims to grow the organization's endowment fund.

To inform us of your plans or request information contact Gabie Benson, Foundation manager, at (317) 956-5255. Please advise us how to list your name for recognition purposes or if you desire anonymity. To become a Key Circle member, you do not need to disclose the dollar amount of your gift or other details.

INVEST TODAY

See your legacy blossom during your lifetime. Help us continue to grow our Endowment Fund with an outright gift of cash, securities, or real estate. In addition to many tax benefits, donors making significant investments in our Endowment Fund will also be recognized as Key Circle members.

YOU'RE INVITED!

The REALTOR® Foundation established the Key Circle to recognize and extend appreciation to those who generously made a gift commitment to the Foundation's Endowment Fund. The Key Circle is a special group of The REALTOR® Foundation supporters who are committed to supporting the Foundation's future. Key Circle members are unlocking the doors to hope for central Indiana's homeless in perpetuity. We encourage you to share this vision. Membership in the Key Circle is open to anyone who has or will be providing a planned gift of any amount or type or significant investment in the Endowment Fund.

TYPES OF PLANNED GIFTS TO CONSIDER

Bequests

A bequest in your will or trust is the most frequently used planned gift and is fully deductible for estate tax purposes. Bequests can take on many forms, such as a specific dollar amount, a percentage of your estate, or the remainder of your estate.

Life Insurance Policy

You may donate a new policy or designate The REALTOR® Foundation as the beneficiary and/or owner of an existing policy.

Retirement Plans

IRA or 401(k) plans can be subject to both income and estate taxes, greatly limiting the percentage available for heirs. As a result, you may choose to designate The REALTOR® Foundation as the beneficiary, qualifying the gift for an unlimited estate tax charitable deduction.

Charitable Lead Trusts

Charitable lead trusts provide a way to pass significant wealth to your heirs at minimal or no transfer-tax cost, while making immediate gifts to the Foundation.



*Real estate has been a family business for me. **Making the REALTOR® Foundation the beneficiary of my IRA plan** was an easy way to ensure that homeless families in our community have access to housing for years to come.*

—KAYE HIRT EGGLESTON