

Legacy Society Options

Thank you for considering a legacy gift for Homage Senior Services (formerly known as Senior Services of Snohomish County). This document is designed to provide you with basic information to start your planned giving process.

There are a variety of ways to structure planned gifts based on your immediate and future needs. A few are listed here and we recommend that you consult with an estate planning professional, financial advisor, and/or a tax professional to design the most appropriate gift for your circumstances.

Gifts of Retirement Funds, Life Insurance, and Bank Accounts

These are gifts you can easily establish on your own without the help of estate planning professionals.

- Contact the administrator of your retirement plan, life insurance policy, and/or bank accounts for their specific procedures.
- Name Homage Senior Services* as a beneficiary and designate a fixed amount or percentage.

Gifts through your Will or Living Trust

These gifts often require the help of estate planning professionals.

- Name Homage Senior Services* as a beneficiary and designate a fixed amount, specific asset, or percentage of your estate through a will or revocable living trust.

Other Ways to Give

These gifts often require the help of estate planning, financial, and/or tax professionals.

- **Cash:** Make an immediate donation to the Homage Endowment Fund (through the Community Foundation of Snohomish County) or establish your own endowment fund and take a charitable income tax deduction as provided by law.
- **Appreciated Assets:** Contribute appreciated assets, such as stock or real estate, and receive a charitable tax income deduction based on the value of the assets, reducing capital gains taxes.
- **Gift Annuities:** Establish a gift annuity that provides you with a lifetime income.
- **Charitable Trusts:** Establish a charitable remainder trust that provides you with a fixed or variable lifetime income and receive a charitable income tax deduction at the same time.
- **Retained Life Estate Gifts:** Donate property (home and/or land), enjoy the benefits of home ownership for life, and take a partial charitable income tax deduction immediately.

Legacy Society

Please let us know if you have designated Homage Senior Services* in your estate plans so we can officially welcome you to our Legacy Society. Together, we can keep seniors and people with disabilities living independently and with dignity.

Questions Kit Massengale, Director of Philanthropy, 425.290.1262 / kmassengale@homage.org



Legacy Society Membership Form

Your generosity will not be forgotten! Thank you for your interest in supporting Homage Senior Services* (formerly known as Senior Services of Snohomish County). The information in this form will help us ensure your gift is implemented as you wish.

Contact Information

| | | | |
|----------------|------------------------|-----------|--------------------------|
| Date | | | |
| Name | | | Nickname: |
| Street Address | | | Apt: |
| City | State: | Zip Code: | |
| | Preferred Contact Info | | |
| Day Phone | | | <input type="checkbox"/> |
| Evening Phone | | | <input type="checkbox"/> |
| Email | | | <input type="checkbox"/> |

Gift Details

| |
|---|
| <input type="checkbox"/> I have included/intend to include a gift to Homage Senior Services* in my will. |
| <input type="checkbox"/> I have named/intend to name Homage Senior Services* as a beneficiary to a life insurance policy. |
| <input type="checkbox"/> I have named/intend to name Homage Senior Services* as a beneficiary of an IRA. |
| <input type="checkbox"/> I have/would like to customize a planned gift for Homage Senior Services.* (Please contact me.) |
| <input type="checkbox"/> Other |
| <input type="checkbox"/> Estimated value of gift (optional): \$ _____ - or - _____ % of Estate |

Gift Recognition

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|---|
| With this gift, we'd like to welcome you to our Legacy Society. Please let us know how you would like to be listed in our Legacy Society materials (ex. Jane and John Doe; Mr. John Doe, Sr). |
| |

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Return this Form Homage Senior Services
11627 Airport Rd, Suite B
Everett, WA 98204-8714

Formerly: Senior Services of Snohomish County
Address: 11627 Airport Rd, Suite B, Everett, WA 98204
Tax ID: 91-0910680

DBA: Homage Senior Services
Telephone: 425.355.1112

