The Acorn Society honors individuals who have named the Foundation as a beneficiary of a bequest, trust, retirement fund, or other asset. Just as an acorn grows into a mighty oak, a planned gift will yield enormous benefits to future generations. You can support the causes and community closest to your heart by making a bequest to the Foundation. We are uniquely able to carry out your many diverse charitable goals.

Making a gift after your lifetime is easier than you might think. With just a bit of guidance today, the Foundation can carry out your charitable wishes in perpetuity.

Pledging funds for the future is a vote of confidence in our community. Your commitment helps to guarantee the Foundation has the resources to respond to our region’s future challenges and opportunities.

“Leaving all you have to your family is a good legacy. But leaving a percentage to the community is a better legacy.”
- Pamela Boisvert, Acorn Society Member
PLANNED GIVING

- **Charitable Bequests** – Including a charitable bequest in your will is a simple way to make a significant contribution that may have not been possible during your lifetime. When you give to GWCF in your will, you may reduce your estate taxes while continuing your charitable giving. You can choose to give a specified dollar amount, property, a percentage of your estate or the remainder after distributions to other beneficiaries.

- **IRA, 401(k), or other Qualified Retire Plan Assets** – Deferred income tax and estate tax can erode the value of your retirement assets. By transferring these assets to GWCF upon your death, you can preserve 100% for causes you care about and your heirs avoid heavy inheritance taxes if given to them.

- **Life Insurance** – A gift of life insurance provides a simple way to establish your legacy by giving a significant gift to charity, while enjoying tax benefits during your lifetime.

- **Charitable Gift Annuity** – A charitable gift annuity allows you to arrange a generous gift to your charities, while providing yourself a steady income. You transfer assets to the Foundation in exchange for a tax deduction and a lifetime income of fixed annuity payments from GWCF for the rest of your life.

- **Charitable Remainder Trust** – Giving through a charitable remainder trust allows you, or someone you select, to receive income for the rest of your life, with the remainder to benefit your community. Assets are transferred into a trust, and the trust pays you or a beneficiary regular income payments. Upon the beneficiary’s death or a defined period of years, the remaining assets are transfer to the Foundation. While similar to a charitable gift annuity, a charitable remainder trust provides more options in payout methods.

- **Gift of Retained Life Estate** – You may donate a residence, farm or other land as a future gift and continue using the property throughout your lifetime. You receive a partial income tax deduction and reduced estate taxes.

For more information, please contact Donor Services by calling 508.755.0980 or email donorservices@greaterworcester.org.

OUR MISSION

To enhance our community, now and in the future, through philanthropic leadership.

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