

## Sample legacy brochure, side one

(Example is shown at 75% of actual size)

### You're invited...

to join the ranks of Placer County's most generous and forward-thinking residents as a member of the Legacy Society of Placer Community Foundation.

Members of the Legacy Society have one thing in common: all have made a commitment to support the future of their community through an estate gift to Placer Community Foundation.

They have other things in common as well. They have worked hard, saved wisely and invested well. They understand the power of endowment. And they know that the assets they leave to the community will continue to grow, supporting good works for generations to come.

### A lasting legacy

**M.S. and Esta Beecher**, born in the 1870s, were adventurers from the Midwest who traveled the United States and Canada in their youth, survived the perilous journey to western Alaska's Yukon Territory in the 1890s Klondike Gold Rush, married in British Columbia in 1908, and settled in Auburn in 1923.

After the Great Depression, the enterprising Beechers purchased a vacant parcel of Auburn land that held great potential for future development. Their vision was a bit ahead of its time, and early development efforts failed. Still, the Beechers persisted, and donated the property to establish The Auburn Community Foundation in 1948.

In conveying news of the gift, Mr. Beecher wrote: *The Auburn Community Foundation is a clearing house for every charitable impulse, an escape from excessive inheritance taxes and income taxes. The same opportunity is open to all who choose peace of mind by settling their worldly affairs while they can enjoy the satisfaction that comes from knowing that one's wishes will be carried out.*

In 2005 the Auburn Community Foundation restructured to serve a larger community and formed the Placer Community Foundation—thus the Beecher's legacy continues.

## Legacy Society

**Placer  
Community  
FOUNDATION**  
*Local giving. Lasting value.*

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**Placer  
Community  
FOUNDATION**  
*Local giving. Lasting value.*

gatefold panel

back cover

front cover



## Sample legacy brochure, side two

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When you join the Legacy Society of Placer Community Foundation, you'll find uncommon opportunities to remember, share, and connect. You'll be invited to:

**Name your charitable fund.** We encourage you to use your gift to honor the name of your family or loved ones. You may, of course, choose anonymity instead.

**Share your personal history.** We'd like to preserve your story and photographs for future generations who will receive grants from your fund.

**Attend special community events.** We'll introduce you to other generous people who have also provided for Placer County's future in their estate plans.

**Learn of changes in California probate or federal tax law.** We want to help you make sure your estate plan continues to accomplish your financial and charitable objectives.

**Be named in Placer Community Foundation publications.** We'd like to give others the opportunity to follow your example of community stewardship and leadership. (We also respect the wishes of those who prefer to give anonymously.)

Your planned gift or bequest puts you in good company today. Tomorrow, your gift will do good works in our communities for generations to come.

Thank you for preserving a portion of your estate for your community—for good, forever.



## Questions & answers

**Why** do people give to charity through their estate plans?

*Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, these include preserving the family name, honoring loved ones, providing for heirs, minimizing tax burdens and supporting the community they call home. Bequests to the community foundation are exempt from estate taxes.*

**Who** can make a legacy gift?

*Anyone with a desire to give can make a legacy gift. Many people give assets including IRAs, securities, real estate, insurance benefits, and cash. Many are surprised to learn how easy it is to create a lasting legacy.*

**What** good work can I do with my legacy gift?

*You can support the arts, enrich education, protect the environment, provide human services, safeguard health, foster a stronger community... and more. Tell us what is important to you.*

**When** should I include the gift in my estate plan?

*Any time you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your financial or legal advisor can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes, and other considerations. When you notify us of the gift, you automatically become a member of the Legacy Society.*

**Where** can I do the most good?

*That depends on what you want to accomplish. We are knowledgeable regarding local needs and agencies, and can help you craft a plan to support the causes you care about most... in Placer County and elsewhere.*

**How** do I plan an estate gift?

*Call your estate advisor, talk to us, or consult with both. We provide confidential philanthropic services to prospective donors and their professional advisors, without pressure or obligation. Giving a legacy gift is simple:*

- You include a bequest to the community foundation in your will and notify us;*
- Upon your death, we establish a fund in the name you've chosen;*
- We invest the principal and make grants from the income, handling all administrative tasks.*

inside panels

