



Have you considered including Habitat in your will or estate plans?

With a legacy gift to Habitat for Humanity Georgetown County you can help us do what we do today, even better and for generations to come. You can make a gift in your will, trust, or other account that becomes your personal legacy of changing your community through shelter. A legacy gift will ensure that your support will continue to help more local families for many years to come.

A few ways to leave a legacy gift include:

- ◆ Gift in Your Will
- ◆ Gift of Stocks
- ◆ Gift of Life Insurance
- ◆ Gift of Savings Bonds
- ◆ Gift of Real Estate
- ◆ Gift of Personal Property

We are here to help you and your advisors as you plan what is best for you. We encourage you to work with your estate planning professional as you consider the type of legacy gift that is right for you and your family.

For more information on Building a Legacy for Habitat for Humanity Georgetown County contact Christine Cribb at 843-546-5685 ext. 4
Email - resdev@habitatgeorgetown.com



1907 Hampton Court · Georgetown, SC
www.habitatgeorgetown.com

Types of Legacy Gifts

◆ BEQUESTS

A bequest is a gift made through a will or a living trust. It is typically a set dollar amount or percentage of an estate that would come to Habitat for Humanity Georgetown County after the donor's passing. Bequests are the most popular planned gifts, the easiest to make while updating one's documents, and typically cost nothing – except legal fees incurred – during a donor's lifetime.

◆ APPRECIATED SECURITIES (GIFTS OF STOCK)

Publicly traded appreciated securities that a donor has owned for more than one year can be transferred to Habitat for Humanity Georgetown County. Habitat may then sell the securities and keep the proceeds, which can be applied to whatever purpose the donor designates. The donor gets an income tax charitable deduction based on the fair market value of the securities and avoids capital gains tax.

◆ LIFE INSURANCE

A donor can designate Habitat for Humanity Georgetown County as a life insurance policy beneficiary. Upon the donor's passing, Habitat receives the proceeds. The donor's heirs benefit as well because policy proceeds distributed to Habitat are exempt from estate tax.

◆ GIFT OF REAL ESTATE

A donor can make a gift of real estate to Habitat for Humanity Georgetown County, removing a large taxable asset from their estate and providing an income tax charitable deduction equal to the appraised fair market value of the property, with no capital gains tax due on the transfer. Habitat can then sell the gift of real estate or keep it for its own use.

◆ PERSONAL PROPERTY

Donors can gift items such as artwork, collectibles or other items of tangible personal property. Often, a gift will yield the donor a full or partial income tax charitable deduction for the items' fair market value, with no capital gains liability to the donor or organization. Keep in mind donated property valued over \$5,000 must be professionally appraised. The nonprofit can either keep the property, display it, or sell it and use the proceeds.

BUILDING A

Legacy

HOMES, COMMUNITIES & HOPE

Planned Giving Language

◆ ESTATE PERCENTAGE WILL OR TRUST BEQUEST LANGUAGE:

I give, devise, and bequeath to Habitat for Humanity for Georgetown County SC, Inc., a nonprofit corporation located at 1907 Hampton Court, Georgetown, SC, 29440 , ____ percent of my estate as an unrestricted gift. Tax ID: 57-0913768.

◆ CASH BEQUEST WILL OR TRUST LANGUAGE:

I give, devise, and bequeath to Habitat for Humanity for Georgetown County SC, Inc., a nonprofit corporation located at 1907 Hampton Court, Georgetown, SC, 29440, the sum of \$_____ as an unrestricted gift. Tax ID: 57-0913768.

◆ REMAINING INTEREST WILL OR TRUST BEQUEST LANGUAGE:

I give, devise, and bequeath to Habitat for Humanity for Georgetown County SC, Inc., a nonprofit corporation located at 1907 Hampton Court, Georgetown, SC, 29440, the rest, residue and remainder of my estate after all debts, expenses and taxes have been paid and all the general and specific bequests have been made, as an unrestricted gift. Tax ID: 57-0913768.

◆ INVESTMENT ASSET WILL OR TRUST BEQUEST LANGUAGE:

I give, devise, and bequeath Habitat for Humanity for Georgetown County SC, Inc., a nonprofit corporation located at 1907 Hampton Court, Georgetown, SC, 29440, ____ shares of common stock of _____ owned by me at my death as these shares shall exist at the date of my death, as an unrestricted gift. Tax ID: 57-0913768.

◆ PROPERTY OR REAL ESTATE WILL OR TRUST BEQUEST LANGUAGE:

I give, devise, and bequeath to Habitat for Humanity for Georgetown County SC, Inc., a nonprofit corporation located at 1907 Hampton Court, Georgetown, SC, 29440, all of my right, title and interest in and to that certain real estate located at [DONOR INSERTS ADDRESS OR DESCRIPTION OF PROPERTY], for its general use and purposes. Tax ID: 57-0913768.

BUILDING A

Legacy

HOMES, COMMUNITIES & HOPE

Letter of Intent for Legacy Gift

I/we desire to provide for the future well-being of Habitat for Humanity for Georgetown County SC, Inc. through a provision in my/our estate plans, and with this letter, I/we are informing Habitat of my/our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name: _____ Name: _____

Date of Birth: _____ Date of Birth: _____

Address: _____ City: _____ State: _____ ZIP: _____

Phone: _____ Email: _____

I/we have made a provision to leave a legacy to Habitat through my/our:

Will Retirement plan or IRA Living Trust

Life Insurance Policy Other: _____

Additional Details _____

I/we wish to inform Habitat for long-term planning purposes only, that the current value of my/our future gift is \$_____. (Please note that this information is optional. You do not have to provide this information.) I/we understand that by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.

Gift Recognition (choose one)

You may publish my/our names in Habitat legacy gift recognition lists as motivation to others to leave future gifts to benefit Habitat.

I/we do not want my/our name(s) published.

Signature: _____ Date: _____

Signature: _____ Date: _____