



YOUR CHARITABLE LEGACY

Choosing the Right Vehicle for your Charitable Giving

Contemplating your charitable legacy seems like a daunting task, but it really boils down to a few key questions: What are you most passionate about? Would you like your legacy gift to be available for immediate use, or do you want it to last for generations to come? Using the guide below, you can find out what path might be right for you. CFNCW is here to support you as you create a customized legacy plan that is either simple or highly customized and complex. The best part: Our services are free of charge at every step of the way!

ASK YOURSELF:	Do I love specific charities?	Am I passionate about certain causes?	Am I passionate about a specific place?	Do I like a combination of these?
Do I want my gift available for immediate spenddown?	Simple bequest in will that names charities. No need for CFNCW	Bequest to CFNCW with instructions to make available immediately for your chosen cause (arts, environment, etc.)	Bequest to CFNCW with instructions to make available immediately in preferred Geographic Field of Interest Fund	Donor Advised Fund with Succession Plan
Do I want my gift to make a lasting impact?	Designated Fund at CFNCW, can name one or more charities as beneficiaries of a lasting endowment	Field of Interest Fund at CFNCW for your chosen cause (arts, environment, etc.)	Geographic Field of Interest Fund at CFNCW (see our LEGACY FUND program!)	Donor Advised Fund with Succession Plan
Do I have a combination in mind?	Designated Fund with specific instructions OR a Donor Advised Fund with Succession Plan	Field of Interest Fund at CFNCW with specific instructions	Geographic Field of Interest Fund at CFNCW with specific instructions (see our LEGACY FUND program!)	Donor Advised Fund with Succession Plan

Further Questions:

Do I want my children or grandchildren to inherit my commitment to giving? If YES, a Donor Advised Fund with a Succession Plan can do this. You can name children or grandchildren as successor advisors to a charitable fund they can use to support causes they care about.

Do I need a stream of income during my lifetime to complement my charitable legacy plan? If YES, consider a Charitable Remainder Trust, which provides you income during your lifetime and leaves a gift to charity after your lifetime.

