

LEAVE A LEGACY.  
MAKE A DIFFERENCE.

## Spartan Legacy Society



TRAVIS MANION  
FOUNDATION

### WHAT IS A PLANNED GIFT?

A planned gift is one that is arranged in the present and allocated at a future date. Anyone can make a planned gift to Travis Manion Foundation!

A planned gift, as part of an overall estate plan, takes your needs as well as the needs of your loved ones into consideration, while helping support the mission of Travis Manion Foundation (TMF).

### HOW DOES A PLANNED GIFT BENEFIT ME?

Planned gifts provide creative and flexible strategies for your estate and charitable planning, including additional income and reduced taxes. A planned gift may enable you to make a more significant donation than you thought possible. It can create opportunities to support the mission in a very impactful way.

### HOW DOES A PLANNED GIFT BENEFIT MY LOVED ONES?

A planned gift can create potential savings on capital gains taxes or estate taxes, lessening the financial burden on your family and loved ones.

Planned gifts allow you to provide a secure future – for yourself, your loved ones, and for Veterans and Families of Fallen Heroes for generations to come. Choosing the right planned gift depends on your personal circumstances and your financial goals. **Leave a legacy that will run deep and wide in the decades ahead.**

Membership in the **Spartan Legacy Society** is reserved for donors who name TMF in their estate plans or as a beneficiary designee.

Notifying TMF of your plans allows us to discuss your wishes for your gift and thank you during your lifetime. Members may remain anonymous. Include TMF in your estate plans and become a part of our **Spartan Legacy Society** today.



**We are happy to discuss the details and benefits of Planned Gifts with you and your financial advisor.**

#### For more information:

Courtney Mitchell  
Chief Development Officer  
215.348.9080 or [courtney@travismanion.org](mailto:courtney@travismanion.org)

P.O. Box 1485 • Doylestown, PA 18901

[www.travismanion.org](http://www.travismanion.org)

## Spartan Legacy Society

LEAVE A LEGACY.  
MAKE A DIFFERENCE.



The following *Planned Gift Options* will help you tailor your gift to meet your unique needs and goals for the future.



## BENEFICIARY DESIGNATION

A simple way to include the TMF in your estate plan is to name TMF as a beneficiary. Doing so is as simple as filling out a beneficiary designation form from your plan provider or administrator.

### Retirement Plans:

You can name TMF as a beneficiary of your qualified retirement plan to receive a designated amount or percentage of assets you wish to be used for charitable purposes.

### Life Insurance:

Name the TMF as beneficiary of a policy you own.

Other forms of beneficiary designations include: Appreciated Securities/Investment Fund Accounts, U.S. Savings Bonds, Bank Accounts, Jointly Held Accounts and CD's.

## GIFTS FROM YOUR IRA

If you are 59 1/2 years of age, you may make withdrawals (no early withdrawal penalty) to fund your charitable gifts. If you are at least 70 1/2 years old, you may direct funds to be used to make a charitable gift on a tax-free basis.

## GIFT LIFE INSURANCE

Purchase a new policy or gift a paid-up policy or one on which you are currently paying premiums to TMF.

## BEQUEST IN YOUR WILL

Through your will you can give:

- A specific sum of money or specific property.
- A percentage of your total estate.
- All or a percentage of the remainder after all other bequests are satisfied.

If you have already created your will, you can create a simple change, called a codicil, to add TMF as your beneficiary.



## LIFE-INCOME GIFTS

With life income gifts, TMF invests the proceeds of your donated assets—whether in the form of cash, securities, or other appreciated property—and pays you, or designated beneficiaries, an income for life or for a specified term of years. Examples include:

### Charitable Remainder Trust:

A charitable remainder trust lets you convert an appreciated asset like stock or real estate into an irrevocable trust, which pays you and/or another beneficiary a lifetime income and lowers your taxes, all while supporting TMF.

### Charitable Gift Annuity:

A charitable gift annuity allows you to support TMF while providing yourself and/or a spouse or other designated individual with a fixed income and the flexibility to decide when to start receiving payments.

### Charitable Lead Trust:

A charitable lead trust allows you to pass assets to your heirs with reduced or no estate taxes, along with providing fixed annual payments to TMF.





# *What's Your Legacy?*

**PLANNED GIVING IS FOR EVERYONE.**

At Travis Manion Foundation, your planned gift leaves a legacy of character, impacting generations to come.



T R A V I S M A N I O N  
F O U N D A T I O N



JOIN THE *Spartan Legacy Society*

Learn how you can achieve your financial goals while giving back to veterans, families of the fallen, and your community through **planned giving with Travis Manion Foundation.**

**BEQUESTS** Making a charitable bequest is a simple and flexible way to recognize Travis Manion Foundation in your will or living trust, ensuring we can continue our mission while maintaining your current assets today.

**BENEFICIARY DESIGNATIONS** By naming Travis Manion Foundation as a beneficiary in receipt of assets such as your IRA, 401K, 403b, or Thrift Savings Plan (TSP), you can rest assured that your contributions make a lasting impact and you may review or adjust your designations at any time.

**GIFTS THAT HONOR LIFE** Consider establishing a gift to honor a loved one impacted by our organization or to mark a special occasion such as a birthday. Your memorial or tribute gift empowers veterans and families of the fallen while honoring the character of your loved one, paying their legacy forward.

**ENDOWMENTS** By giving cash, securities, or other assets through an endowment, you enable Travis Manion Foundation to meet crucial needs for years to come, while maintaining your investment and ensuring the longevity of your impact.

For more information regarding your planned giving options and benefits, including those not listed above, **please contact Courtney Mitchell, Chief Development Officer at [courtney@travismanion.org](mailto:courtney@travismanion.org).**