

# Guide to Legacy and Endowment Giving at Outside In



**“** *My son was a client when he was young, homeless and struggling with many issues, including heroin addiction. Outside In was his lifeline. It may, in fact, have saved his life. I am forever grateful, so as I make my estate plans, I will be leaving a bequest to Outside In in his honor.”*

*-Rachael*

Outside In

[www.OutsideIn.org/donate](http://www.OutsideIn.org/donate)



# Did you know there are many ways to transform lives and create hope with Outside In?

Your thoughtfulness and generosity are critical to serving our community's most vulnerable people today, and long into the future. That's why we've put together this guide to show you many creative ways to give.

## The Gift Anyone Can Make

Many donors give all they can now ... and later. Have you considered leaving Outside In in your **will** or **trust**? It's easy to do. Just include the language below in your estate plans to communicate your wishes.

*"I give to Outside In, an Oregon corporation that is recognized as exempt from tax under Section 501(c)(3) of the Internal Revenue Code, as amended, with its principal offices at 1132 SW 13th Avenue, Portland, Oregon, [all (or \_\_\_\_\_ percent) of my residuary estate] or [the sum of \$\_\_\_\_\_] to be used for its general purposes."*

“ I spent a career in grant making, and for three decades I have watched the programs and operations at Outside In. I am impressed with how OI has wisely managed their finances over the long term. It gives me peace to have confidence that they will effectively manage my unrestricted legacy gift for the future benefit of those whose needs are great and whose way is difficult.”

- Thomas Aschenbrener





## Simple, Yet So Meaningful

**Beneficiary Designations** - You can make Outside In a beneficiary of your Individual Retirement Account, Life Insurance Policy or Donor Advised Fund – often by completing a form online.

## Tax-Wise Options

### Why not donate highly-taxed assets?

**Retirement Funds** - The Individual Retirement Account (IRA) Charitable Rollover may be a good choice if you don't need all the income and meet the age requirement. Ask the financial institution that holds your IRA account to send funds directly to Outside In.

**Appreciated Stock** - You may avoid paying capital gains tax when you donate appreciated stock, bonds, and mutual funds. Giving these assets can be a simple electronic transfer.

**Real Estate** - Is it time to consider what to do with your vacation/rental property, home, farm, or commercial building? Donating real estate to Outside In can be a win-win. Invest in the social issues you care deeply about, and you may reduce capital gains tax at the same time.

**“** *We strongly believe in supporting our homeless neighbors, so we appreciate all the ways of joining with Outside In. We give monthly and we give through an IRA required minimum distribution. We also plan on giving through our estate planning.”*

*-T&C*

## Gifts That Give Back to You

**Charitable Remainder Trusts** and **Charitable Lead Trusts** offer unique ways to create an income stream and be charitable at the same time. These irrevocable arrangements can be used to reduce income tax, capital gains tax, and estate taxes. And, while Outside In does not act as trustee, we are glad to talk with you about your goals.



## Make your Donor Advised Fund (DAF) Work Harder

Unsure about the impact of your **Donor Advised Fund (DAF)**? You've thoughtfully put cash or appreciated stock in a DAF, taken a tax deduction, and now you are recommending grants to charity. If you are interested in leveraging your DAF to have greater impact in the community, **we can help**.

## Gifts That Keep Giving Forever

**Endowments** provide sustainable funding for Outside In and grow over time so that you can have a lasting impact long into the future. They offer **naming opportunities** to honor or remember loved ones and can be designated to issues you care about the most.

*It's a wonderful thing to use my DAF right now to help young people access education and meaningful employment. Outside In has far exceeded my expectations in what giving could feel like. The staff moves so quickly, things are happening every minute of every day to make change and I get to be a part of that."*

*- Bob*





## We're here for you

Let's talk about ways you can create a lasting legacy of transformation and give hope to those in our community who need us the most.



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Please consult with your financial advisors to make the best gifts for your situation. This information is not intended to provide legal, financial or tax advice.

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