



Greater Indy
Habitat
for Humanity®



BUILDING A

Legacy

OF HOMES

COMMUNITY

HOPE

GREATER INDY HABITAT *founders*

Pictured: Founding members of Greater Indy Habitat for Humanity stay engaged through celebrating at a home dedication: Dick and Alice Brown, Dick and Mary Davis, Bob and Katheryn Hessong, and Warren and Jean Perney.



In 1987, a group of motivated people came together with a vision to build homes alongside families and the Greater Indianapolis community. Now, more than 30 years later that initial act has had a large impact on our community. Hundreds of households have achieved the life-changing dream

of affordable homeownership and tens of thousands from our community have united to work alongside them. The fabric of our community is stronger because of the investment of the founding families and the many people who built on that initial vision. We look back on this legacy. We also

look forward to the future need in our community and dream about how we can achieve Habitat's vision: **a world where everyone has a decent place to live.**

our founders

Named after our initial founders, the Legacy Society invites Habitat for Humanity supporters from all walks of life, interested in making an extraordinary difference as the founders did 30 years ago, to leave a charitable gift to build homes, communities, and hope.

● Learn more by calling Ted Mosey at 317.777.6091 or emailing tmosey@indyhabitat.org.

BUILDING A *Legacy*

what is legacy giving?

It is a philanthropic gift from your will, living trust, retirement plan, or other estate assets to Greater Indy Habitat for Humanity's mission. Some planned gifts even provide you with income during your or someone else's lifetime. Anyone can leave a legacy gift, including people with moderate estates.

why consider legacy giving?

It's a significant way to make a long-lasting impact on the Habitat mission. By making a legacy gift, you provide enduring support to Habitat's work while securing your own legacy.

what are the benefits?

A legacy gift can allow you to maintain assets during your lifetime and provide estate planning and tax advantages. Some options can provide you with income. And when you make a legacy gift, your direction and decisions are honored on how to use the funds and your impact on the community endures.

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**we are here to make
sure your Habitat
legacy continues on
for years to come**



WAYS TO *give*

how do I get started?

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 and tax and financial advisors as you consider the type of legacy gift that is right for you and your family.

a gift in your will

The simplest way to leave a planned gift is to make a bequest that names Greater Indy Habitat for Humanity as the recipient of a charitable gift in your will or living trust. You may contribute a specific dollar amount, a percentage of your estate, or the residual of your estate. Greater Indy Habitat staff can provide you with sample language for a bequest.

a gift in your retirement funds

Another easy way to leave a bequest is to name Greater Indy Habitat for Humanity as the beneficiary of your retirement funds held in your IRA, 401(k), or 403(b) to add to or establish a charitable fund. This is a simple and effective way—and maybe the most tax advantageous—to create your legacy since it will not be subject to either estate or income taxes, as it would be if left to anyone but a spouse.

a gift of life insurance

Like your retirement accounts, a separate beneficiary designation form determines who will receive money from your life insurance policies. Policies you own enable you to name a charitable beneficiary. A simple way to make a legacy gift is to designate Greater Indy Habitat for Humanity as the full or partial beneficiary on the required beneficiary form. This is one of many ways to donate life insurance. Please contact us directly for more details.

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OTHER *gifts*

a charitable gift annuity

A charitable gift annuity allows you to receive guaranteed income for life and an immediate charitable income tax deduction, as well as supporting charitable organizations meaningful to you. You make an irrevocable gift to Greater Indy Habitat for Humanity, and Greater Indy Habitat for Humanity pays a fixed dollar amount to you and one other person (if you choose). The remainder of the annuity could leave a meaningful legacy for the Habitat mission at your passing. The annuity income depends on your age, the number of people receiving payments, and the amount of your gift to establish the annuity. A portion of your gift annuity income may also be income-tax-free. Please contact Greater Indy Habitat for Humanity to learn more about charitable gift annuities and how they might benefit you and the Habitat mission.



a charitable lead trust

A charitable lead trust distributes income to your charitable fund for a period of years or during your lifetime. Then the assets return to you or your surviving family members. The result is gift and estate tax savings. A charitable lead trust can allow you to make a significant gift to charity and transfer assets to family members with little or no gift and estate tax.

a charitable remainder trust

By transferring assets to establish a charitable remainder trust, you receive an immediate tax deduction and lifetime income for you and your named beneficiary. You can also reduce or avoid capital gains taxes associated with the gifted asset, and you would remove the assets from your estate. When the trust's term is complete, any remaining assets pass to Greater Indy Habitat for Humanity. Charitable remainder trusts offer a great deal of flexibility, and you can receive a fixed dollar amount each year (an annuity trust), or a variable amount based on a fixed percentage of the fair market value of the trust assets (a unitrust).



YES!

I would like to show my support by joining the Founders Legacy Society.

Name: _____

Telephone: _____

Address: _____

City: _____

State: _____ Zip: _____

Email: _____

☐ Please contact me about setting up a planned gift.

☐ I have included Greater Indy Habitat into my estate plans.

THE FIRST
step

... is the most important one.

Thirty years ago when the dream of Habitat for Humanity emerged in our area, the first step was the most important step. The founding advocates of Habitat in our area did not know how that initial dream would grow and evolve. They just knew they needed to take the first step and we are thankful they did. There is no better time than now to take the first step toward planning your legacy gift. Your investment can be instrumental to build on Habitat's mission for the next 30 years and beyond.

thank you for your *Legacy*

Whether you have supported Greater Indy Habitat for the past 30 years or are new to the work, you know the impact of what we are building together. We thank you for your involvement and invite you to join in building a legacy through a planned gift. In doing so, you join a like-minded group of people. We meet periodically to thank you and discuss stories of Habitat's impact and future. We want to celebrate your decision and list your name* on our annual community report and on our website at indyhabitat.org.



*You can remain anonymous, if you prefer. You will receive updates and invitations, but we will not list your name in print or online.



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*Seeking to put God's love into action, Habitat for Humanity
brings people together to build homes, communities and hope.*