

Contact:

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Planned Giving

Leave a legacy that will benefit thousands for years to come

Planned Giving is a wonderful way to ensure ProJeCt's future and your legacy. Planned gifts are crucial to making sure that ProJeCt is able to continue serving thousands of Lehigh Valley residents in need for years to come. Supporters like you are creating their legacies today and helping us plan for tomorrow by remembering ProJeCt in their plans.

ProJeCt recommends you speak with your financial advisor or legal counsel first to learn more about your options. Once you have decided on a type of planned gift, please contact Alison O'Connell at 610-258-4361 ext.21 or AConnell@projecteaston.org to discuss.

Bequest by Will: Including a charitable bequest in your will is a simple way to make a lasting gift to ProJeCt. You can leave a bequest to ProJeCt by adding to an existing will or drafting a new one. In doing so you leave a legacy to ProJeCt and your community, yet preserve and enjoy assets you might need during your lifetime. Plus, the assets distributed to ProJeCt are exempt from estate tax.

Life Insurance: Giving through life insurance is one of the simplest ways to make a significant contribution to ProJeCt and establish your legacy of giving. You can designate ProJeCt as the primary or secondary beneficiary of either 100% or some percentage of the proceeds from the policy. Or you can transfer to ProJeCt ownership of the policy – either paid in full or for which you continue making premium payments. The transfer of the policy is a present gift for which a charitable tax deduction may be taken, and your continued payments are each considered charitable contributions, deductible to the extent of the law.

Gifts from Retirement Plans: Retirement plan assets (those in qualified plans and IRAs) are ideal for charitable giving purposes because these assets are often heavily taxed when passed to non-spouse beneficiaries. To make a future gift of retirement plan assets simply requires a designation of ProJeCt as the beneficiary of the plan.