

# Ensuring Kaua'i's glorious future...



...through  
Planned  
Giving

## Consider the Possibilities

As a component fund of Hawai'i Community Foundation, Kaua'i Aloha Endowment can be supported through a variety of future gifts:

- **Bequests** - The simplest planned giving is a bequest in your Will or trust that directs specific assets or a percentage of your estate to the Kaua'i Aloha Endowment Fund.
- **Charitable Remainder Trust** - Contributing a gift to an irrevocable trust provides you with income payments for your lifetime or term of years. The remainder eventually goes to the Kaua'i Aloha Endowment Fund.
- **Charitable Lead Trust** - You give income-producing assets to fund a trust with income flowing to the Kaua'i Aloha Endowment Fund during the term of the trust. Afterwards, the assets flow to your heirs free of tax on the assets' appreciation.
- **Charitable Gift Annuities** - A simple contract guarantees you a fixed income in exchange for a gift to the Kaua'i Aloha Endowment Fund. Annuity rates are set by the American Council on Gift Annuities.
- **Life Estates** - You can contribute a primary residence, a vacation home or a farm, but you retain the right to use it during your lifetime. You receive an immediate tax deduction and the property is not included in your estate.
- **Retirement Plan Beneficiary Designations** - You can make the Kaua'i Aloha Endowment Fund a beneficiary of a retirement plan, such as an IRA.

Many individuals choose to support the charitable causes that are dearest to their heart through a bequest in a will or living trust. Consider the fact that such a future gift to Kaua'i Aloha Endowment is a way that year after year after year you can help provide a grant to protect, preserve and enhance Kaua'i's Island treasures.... today, tomorrow and forever.



*Your planned gifts will provide funds forever to support the well being of Kaua'i and her future generations*

## What Can I Do Next?

Talk with your financial advisor and decide what program might be best for your desires and how the financial benefits of your gifts can be maximized. Then, call the Kaua'i office of Hawai'i Community Foundation at 808-245-4585 to discuss how you can most effectively support the future of Kaua'i Aloha Endowment. All inquiries will be held in strictest confidence. Your gifts are deeply appreciated and will be wisely used.