

# Mutual Aid Disaster Relief

## A Legacy of Solidarity

### Planned Giving: Wills & Bequests

You do not need to be wealthy to leave a legacy. Make your commitment to solidarity and mutual aid by joining with Mutual Aid Disaster Relief by making a planned gift. You can support our long-term financial sustainability and have a powerful impact on disaster survivor's lives.

#### What is Planned Giving?

Planned giving is a win-win approach to donations that supports your favorite organization and can benefit you now or in the future. Have you ever made a vehicle donation to benefit your favorite organization? If you have, you know that transferring assets is easy and it can provide tax benefits as well. Simply put, "planned giving" is the transfer of assets to a designated organization during a lifetime or as part of an estate plan. This forward-thinking approach to giving is "planned" because often these assets are not liquid, have tax consequences and are generally transferred via a will or other written means.

#### How to?

*A fixed amount of money or a designated property:*

"I give to Mutual Aid Disaster Relief Inc. (EIN# 81-3606763) located in Tampa, FL, \$\_\_\_\_\_ (or describe the real or personal property, including exact location.)"

*A percentage of the estate:*

"I give Mutual Aid Disaster Relief Inc. (EIN# 81-3606763) located in Tampa, FL, \_\_\_\_\_% of my estate."

*A residual bequest:*

"I give all the residue of my estate, including real and personal property, to Mutual Aid Disaster Relief Inc. (EIN# 81-3606763) located in Tampa, FL."

*A double-purpose bequest:*

You can provide a relative or friend with income for life through a special gift to our organization. You can do this by establishing a charitable trust through your Will. Upon your death, the trust pays income to the person you designate. After that person's death, whatever remains in the trust passes to our organization.

If you wish to have your bequest applied to a specific program, simply add "...for the benefit of (name of program)" to the language suggested above.

#### Consult an attorney when preparing legal documents.

For assistance in planned giving to Mutual Aid Disaster Relief or for more information please email us at [MutualAidDisasterRelief@gmail.com](mailto:MutualAidDisasterRelief@gmail.com), call us at (727) 623 6414, or call our estate planning attorney, Jim Grinaker, at (727) 214 8972.

*In solidarity and gratitude,*

Mutual Aid Disaster Relief