



Planned Giving

Bequests/Wills

A bequest may be made in your will or trust directing a gift to the organization. This is one of the easiest ways you can leave a lasting impact on KEEN Greater DC through planned giving. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to KEEN Greater DC as part of your estate plan.

A Bequest May be Made in Several Ways:

- Gift of a percentage of your estate.
- Gift of a specific dollar amount or asset.
- Gift from the balance or residue of your estate.

Possible Benefits of Your Bequest

- Receive estate tax charitable deduction.
- Lessen the burden of taxes on your family.
- Leave a lasting legacy.

Stocks and Bonds

A gift of appreciated securities, including stocks or bonds, is another way to make a gift to KEEN Greater DC. The full value of the stock or bond, at the time of your donation, is tax deductible to you as the donor.

The potential benefits of this type of gift include:

- Reduced capital gains tax.
- Receive a charitable income tax deduction.
- Enjoy possible increased income.
- Further our mission today!

Retirement Assets

A gift of retirement assets (IRA, 401(k), 403(b), pension or other tax deferred plan) is another option for making a gift to KEEN Greater DC. Your retirement assets may be transferred to KEEN Greater DC by completing a beneficiary designation form provided by your plan custodian. If you designate KEEN as your beneficiary, we will benefit from the full value of your gift and your estate will benefit from an estate tax charitable deduction for the gift.

Life Insurance

Life insurance policies are another vehicle that can be used to contribute to KEEN Greater DC. You can designate KEEN Greater DC as one the beneficiaries or sole beneficiary of your life insurance policy. You will continue to own and can make use of the policy during your lifetime. The policy will be included in your taxable estate when you pass away, but your estate will benefit from an estate tax charitable deduction for the value of the policy gift to KEEN Greater DC.

Note: Planned giving can result in significant tax benefits. Because KEEN Greater DC does not offer tax advice, we urge you to consult a tax professional.