



**IDAHO
COMMUNITY
FOUNDATION**

Flexible Options for Planned Gifts

The Idaho Community Foundation offers several ways to include philanthropy as part of your clients estate planning.



Bequest – Create a new ICF charitable giving fund or name an existing fund as a beneficiary.

Life Insurance – Transfer an existing policy to the Idaho Community Foundation or purchase a new one in ICF's name.

Retirement Assets – Maximize value of these assets by naming ICF as the beneficiary, minimizing income taxes and estate taxes.

Charitable Trusts – Provide income to heirs and then to ICF (charitable remainder trust) or provide to ICF and then to heirs (charitable lead trust).

Charitable Gift Annuity – Receive lifetime income in exchange for a charitable donation of cash, stocks or other assets. Accepted case-by-case. Contact ICF to discuss availability.

The Planned Gift Calculator on our website can help you decide between a charitable trust or charitable gift annuity - www.idahocf.org/professional-advisors/planned-giving

To learn more:

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idahocf.org/professional-advisors/planned-giving