



# HOW AGE CAN BE A PART OF YOUR STORY

## Your Guide to Planned Giving



Can AGE Be a Part of Your Story?



The Future of Older Adults & Caregivers



Choose How to Tell Your Story



I'm Ready to Make AGE a Part of My Story



Shared Journey Society

# Can AGE be a Part of Your Story?



**“The most powerful person in the world is the storyteller. The storyteller sets the vision, values and agenda of an entire generation that is to come.”**  
– Steve Jobs

YOU are a storyteller that has the power to shape a future where older adults and caregivers THRIVE. AGE of Central Texas wants to be a part of the story and legacy you leave for the next generation.

AGE is leading the movement charged with looking after our community's most vulnerable members - older adults and those who care for them.

Our mission is to support individuals so thoroughly and in such a personal way that their focus can broaden from survival to renewal.

With six comprehensive programs, AGE is addressing the unique needs of our Central Texas aging community.

By making the ultimate gift to AGE, you can secure a future for older adults, by creating a community where they can age with dignity, love, and independence.



## A Planned Gift Can Benefit You and Your Family

At AGE, we want to help you fulfill your philanthropic goals! Use this guide as an exploration of the many planned giving options available to you and your loved ones.



# The Future of Older Adults & Caregivers



**AGE has big plans for the future and we'd love for YOU to be a part of them!**

AGE is expanding to South Austin to better serve the rapidly growing number of older adults and caregivers in need. In September 2019, AGE purchased the land for this building and has worked with a team of architects and AGE staff members to design a state of the art facility that will be specially equipped to provide compassionate and individualized care for older adults with cognitive or physical challenges as well as their caregivers.



**A planned gift will protect AGE's future as it will allow the organization to continue evolving and growing to meet the needs of the aging community in Central Texas.**



Unrestricted planned gifts will be used to fuel sustainability funds that can be drawn upon in times of financial need. The financial stability that these funds create will serve as a safeguard for AGE's services while also increasing AGE's chances at receiving significant investments from local funders. Restricted funding, when possible, will support the program or initiative of your choice.

*If interested in discussing how you would like to restrict your planned gift, please email Jayden Beatty at [JBeatty@AGEofCentralTX.org](mailto:JBeatty@AGEofCentralTX.org).*

# Choose How to Tell Your Story

You, as the donor can plan now and choose to give now or give later. What do we mean by this?

Gifts such as bequests, retirement plans, and life insurance are planned for now, and then distributed to AGE upon your passing. This is one of the most meaningful ways for you to leave your legacy while creating a future for older adults and their caregivers to thrive.

Gifts of cash, personal property, real estate and/or mineral rights, qualified charitable distributions, appreciated securities and gifts given through a donor advised fund can all be given now to have an immediate impact on older adults and caregivers in Central Texas. If you, as the donor so choose, these gifts can also be given after your passing.

To choose the gift that matches your philanthropic goals you should consider when you want your gift to be distributed to AGE, and what types of tax benefits you want to receive. Planned giving can provide relief and/or benefits on income tax, estate tax, and capital gains tax. To help you and your family match your gift to your goals, please use our guide on the following two pages.

## Gifts that you can plan for now, and will be distributed to AGE later.



### Bequests

Name AGE in your will, trust or other estate plan document. This can be specified as a dollar amount or estate percentage. Sample will language available at the end of this guide.



Reduce Income Tax



Reduce Estate Tax



### Retirement Plans

Name AGE as a beneficiary to your IRA, 401(K), 403(B), pension, or other tax-deferred plan. This is a simple way to make a gift upon your death and can provide tax benefits as well



Reduce Income Tax



Reduce Estate Tax



### Life Insurance

Name AGE as a beneficiary of your life insurance policy and the death benefit will pass to AGE upon your passing.



Reduce Estate Tax

# Gifts that you can plan for now and will be distributed to AGE **now** or **later**.



## Appreciated Securities

Giving securities, including stocks and bonds, and mutual funds is easy and effective. A gift of appreciated securities to AGE can provide a tax deduction and help avoid capital gains tax. Recipient broker account information available upon request.

- ✓ Reduces Income Tax
- ✓ Reduces Capital Gains Tax



## Gift of Personal Property

Make a gift of an asset no longer needed and generate an income tax deduction. Ex. Artwork, jewelry or cars.

- ✓ Reduces Income Tax
- ✓ Reduces Capital Gains Tax



## Gift of Real Estate and/or Mineral Interests

Give your home, ranch, vacation property, commercial property or vacant lot. If your property has appreciated, giving it to AGE can provide a tax deduction and help avoid capital gains tax.

- ✓ Reduces Income Tax
- ✓ Reduces Capital Gains Tax



## Qualified Charitable Distribution (IRA Rollover)

Give a tax-free IRA charitable rollover without being subject to income taxes on the required minimum distribution. You must be 70 and a half years or older.

- ✓ Reduces Income Tax



## Donor Advised Fund

Give through a donor advised fund to make a charitable contribution, and then recommend donations to AGE from the fund over time.

- ✓ Reduces Income Tax
- ✓ Reduce Capital Gains Tax



## Cash

Giving cash is simple and the most basic way to make a difference at AGE. Set up a recurring gift to be paid monthly or quarterly as an easy way to maximize your income tax relief while increasing your impact.

- ✓ Reduces Income Tax



## I'm Ready to Make AGE Part of My Story

### Things You Need to Know

IRS Circular 230 Notice: AGE of Central Texas does not provide legal, tax, or financial advice. Consequently, we urge you to seek the advice of your own legal, tax, or financial professionals in connection with gift and estate planning matters. This information is not intended to be used and cannot be used for the purpose of avoiding tax-related penalties.

#### What you need from us:

- Tax ID (EIN Number): 74-2431028
- Legal Name: Austin Groups for the Elderly
- Address: AGE of Central Texas  
3710 Cedar St.  
Box 2  
Austin, TX 78705

#### What we need from you:

- Declaration of Intent Form - This will be a formal expression of intent to make a planned gift to AGE of Central Texas (please find at the end of this guide).

### For Your Attorney or Advisor

#### Sample Statement of Allocation:

I hereby direct \$\_\_\_\_\_ (or \_\_\_\_ percent of my residual estate) in cash, securities, or other property to Austin Groups for the Elderly.

This gift will be unrestricted to benefit the organization at their discretion. OR

This gift shall be restricted to be used as (explain donor's intended use of funds)

## We are here to help!

After reviewing the many ways you can help older adults and caregivers in a mutually beneficial way to you and your family, the next step is to contact the Development Department at AGE of Central Texas. We'll talk you through any questions you may have, and what comes next.

### Contact Info:

Jayden Beatty, Director of Development  
512-600-9284  
JBeatty@AGEofCentralTX.org



## THE SHARED JOURNEY SOCIETY

*Help us tell your story!*

The Shared Journey Society recognizes individuals and families who have named AGE of Central Texas as the beneficiary of any type of planned gift.

Our purpose is to recognize and thank those who have made this generous, life-long commitment to AGE. We are inspired by you who shares our mission to help older adults and their caregivers thrive as they navigate the realities and opportunities of aging and caregiving.

### Member benefits:

- Invitation to annual luncheon to recognize members, receive an exclusive report on the status and future of AGE presented by AGE's Executive Director and Board President, and offer feedback as a valued investor.
- Invitation to AGE events.
- Name placement on the Shared Giving Society plaque to be hung in AGE's Central Austin Location. Name will be added when gift is recieved.

Please contact Jayden Beatty, Director of Development, by email at [JBeatty@AGEofCentralTX.org](mailto:JBeatty@AGEofCentralTX.org) or by phone at 512-600-9284 with any questions or to pledge a planned gift. Visit [AGEofCentralTX.org](http://AGEofCentralTX.org) for more information.



## Declaration of Intent

As an expression of my desire to provide older adults and caregivers with the support and resources they need and in recognition of my confidence in AGE of Central Texas and its' mission, it is my intent to name AGE as a beneficiary of my/our planned gift.

**I have included a gift to AGE of Central Texas (Tax ID 74-2431028) through:**

- Bequest in My will or Trust
- Life Insurance Beneficiary Designation
- Retirement Plan Beneficiary
- Appreciated Securities (ex. stocks, bonds, mutual funds)
- \*Personal Properties (ex. car, furniture, jewelry)
- \*Gift of Real Estate and/or Mineral Interests (ex. vacation home, commercial property, vacant lot, etc..)
- Qualified Charitable Distribution (IRA Rollover)
- Donor Advised Fund
- Cash
- \*Other, please list: \_\_\_\_\_

***\*=If interested in giving this way, please contact Jayden Beatty at  
JBeatty@AGEofCentralTX.org***

**My gift is currently valued at:**

- \$ \_\_\_\_\_
- All of my estate. Estimated amount based on today's value: \_\_\_\_\_
- Part of my estate. Estimated amount based on today's value: \_\_\_\_\_
- Other, please describe: \_\_\_\_\_

**I would like my gift designated to:**

- Unrestricted
- Restricted for a specific use. Please describe: \_\_\_\_\_

\*Gift designation, if specified, may be dependent on the status of the program upon receipt of gift. If the donor's specified allocation is no longer available upon receipt of the gift, the funds will be directed towards a general sustainability fund that will be used to support the organization's most pressing needs.

**I would like my gift to be made:**

- In memory of: \_\_\_\_\_
- In honor of: \_\_\_\_\_
- Anonymous: \_\_\_\_\_



**In the event of public recognition I would like the gift listed as (please print):**

Ex. Jane Doe or in memory of Jane Doe

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\*AGE reserves the right to alter the name designated for public recognition at our discretion. Any changes made will be communicated to conservators of the estate.

**If possible, would you be able to provide AGE of Central Texas with a copy of the will or other documents related to the intended gift? If yes, an AGE representative will follow up to obtain the document(s).**

\_\_\_\_ Yes

\_\_\_\_ No

I/we will inform AGE of Central Texas should I/we change our intent or should the dollar value/amount of my/our estate's potential donation.

**Donor Information:**

Name (please print): \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Austin Groups for the Elderly (Tax ID/ EIN Number 74-2431028).*

Please return this form to:  
AGE of Central Texas  
Attn: Jayden Beatty  
3710 Cedar St. BOX 2  
Austin, TX 78705  
or  
JBeatty@AGEofCentralTX.org