

CHURCH OF THE PALMS LEGACY SOCIETY

Membership Qualifications

The Legacy Society is a way of honoring those members who include the Church of the Foundation in their gift and estate plans. This approach not only provides a method of recording the intent of members, but provides an opportunity to express ongoing appreciation to our donors. It is sometimes hard to identify what motivates a charitably inclined person to make a special financial commitment to the Church or the Foundation. It is our hope that each aspect of our planned giving program may help inspire members to make either an outright or a planned gift.

In General

- Anyone may become a Legacy Society member, regardless of amount committed
- Spouses of donors are automatically included as Legacy Society members

Ways to Qualify

- You may make an outright gift to the Foundations during your lifetime. Gifts may be of money or other assets, such as real estate, securities, insurance policies, copyrights, oil and gas rights, undivided fractional interests in assets and the like.
- You may make a future gift to the Church or Foundation. Future gifts can be made by:
- Providing in your will or revocable trust for a gift to the Church or the Foundation to be made after death.
- Creating an irrevocable agreement, such as a Charitable Remainder Unitrust, Charitable Annuity Trust, Charitable Lead Trust or Life Estate, that eventually directs all or a portion of its assets to the Church or Foundation.
- Naming the Church or the Foundation as primary or secondary beneficiary of your IRA, 401K or other retirement plans.
- Naming the Church or the Foundation as primary or secondary beneficiary on a bank account payable on delivery at death (POD) or transfer on death brokerage account (TOD).