

Appendix:

## HOW TO CREATE YOUR FUND

If this is your first time, getting started we are here to help you every step of the way. Here are a few things to take into consideration as you discuss your decision with your close family and friends.

Whether you are creating or updating your will, selling a company, memorializing a loved one, or you simply want to streamline your giving and tax receipts, creating a Fund gives you the flexibility and creativity you need to accomplish your vision of giving back.

- 1.) **Decide what to give:** You can create a fund using cash, publicly traded stock, retirement plan assets, closely held stock, copyrights, and life insurance. In some cases, you can give art and real estate.
- 2.) **Decide when to give:** Do you want to start a fund for giving today? Or defer your gifts through a will or planned-giving vehicle? You can do either, or both.

Contact us to discuss your options. We can connect you with the trusted experts you can help you decide what type of fund or funds suit you and your family. If you're creating a permanent fund, our trusted experts can help you draft language in your will that makes the most of your charitable goals.

- 3.) **Time to enjoy the Gift of Giving:** This is the best part. Using your blessings to help others prosper. We'll send you an agreement to sign and help you transfer your gift. It's that simple.

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