



What is a planned gift?

A planned gift is a contribution which may be deferred or may provide multiple years of support to Safe Horizon and to you, your family, and your heirs. We refer to such gifts as “planned” because they represent more than a check or annual contribution intended to support the organization immediately. The donor has carefully assessed his or her assets and made choices about managing them over time.

Planned gifts are easy to arrange and uncomplicated, and many allow the donor to see the fruits of their giving during their lifetime. **These gifts can be almost any size.**

Gift planning allows donors to include charitable contributions in their overall financial, tax, and estate planning. Such gifts most often involve assets, leaving personal income unchanged or enhanced. They can provide critical benefits to both the donor and Safe Horizon.

We hope that you are as excited as we are about the Safe Horizon Legacy of Hope Society. To learn more or to discuss a planned gift idea, please contact us in one of the following ways:

1. Call Safe Horizon: 212.577.3888
Ask for our Planned Gifts Department
2. E-mail us: plannedgifts@safehorizon.org
3. Write to:
Planned Gifts
Safe Horizon
2 Lafayette Street, 3rd Floor
New York, NY 10007

It is important to contact us before finalizing your arrangements for any planned gift. We look forward to working together to ensure that we fully understand and fulfill your wishes.

For further information about gift planning opportunities, along with descriptions of wills and additional gift planning tools, please visit:

www.safehorizon.org/plannedgifts

We urge you to discuss your plans with your financial and legal advisors. While planned gifts can be very straightforward, it is important to make sure that you fully understand all the details and the results for you, your heirs, and your family.


safehorizon

moving victims of violence from crisis to confidence

THE SAFE HORIZON LEGACY OF HOPE SOCIETY

A Continuing Commitment:
The Benefits Of Gift Planning



A planned gift is a legacy, a gift that can support Safe Horizon, you, and your family and heirs well into the future.

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Joining the Safe Horizon Legacy of Hope Society

Who benefits from gift planning?

When you join Safe Horizon's Legacy of Hope Society by making a planned gift, everyone benefits. Safe Horizon receives support, now or in the future, to sustain our lifesaving services for women, men, children, and families affected by violent crime and abuse. You as the donor have the satisfaction of knowing that you are making a difference for these clients through Safe Horizon's domestic violence shelters, child advocacy centers, anti-trafficking, and many other programs. With many planned gifts, you and your beneficiaries can also see these results over an extended time period.

Depending on the kind of gift you decide on, you may also:

- Save significantly on income or estate taxes
- Avoid capital gains on appreciated assets such as real estate or securities
- Arrange for continuing income for you and your beneficiaries

What kinds of gifts should I consider?

Planned gifts can be any size and take many forms. While donors often think first of a gift that would support Safe Horizon through their will, there are many other kinds of gifts from which you can benefit now. Here are a few:

Life Insurance. Many people have several life insurance policies. By transferring ownership of one of these fully paid policies to Safe Horizon, you can receive an immediate tax deduction and Safe Horizon will receive a cash gift.

Securities. Including publicly-traded securities in a planned gift provides you with an immediate income tax deduction for the value of those securities on the date that you transfer them to Safe Horizon, regardless of what you paid for them. Since you are making a charitable gift, you pay no capital gains on the securities that you donate.

To learn more, please e-mail us:
plannedgifts@safehorizon.org

Charitable Trusts. There are at least two kinds of charitable trusts which may work well for you and your family while providing long-term benefits to Safe Horizon.

1. With a Charitable Remainder Trust, you would transfer assets to Safe Horizon and arrange for you or your beneficiaries to receive a portion of the market value of these assets each year. When the trust ends, the remaining assets go to Safe Horizon.

2. Through a Charitable Lead Trust, you also set assets aside. In this case, however, the trust makes annual payments to Safe Horizon. When the trust ends, the remaining principal goes to your heirs.

In both cases, there are immediate income tax benefits for you as the donor. In addition, there are no capital gains taxes on the assets that you donate or pass along to your heirs through the trust.

Real Estate. If you have owned a property for over a year, you may donate it to Safe Horizon free of capital gains taxes which would otherwise apply to appreciated property. You can also donate a residence or vacation home and continue to live in it (assuming responsibility for upkeep and taxes) for an agreed-upon period of years. In both cases, you receive an immediate income tax deduction based on the appraised value of the property, the time period that you will continue to use it, and your adjusted gross income.



When you join the Legacy of Hope Society, we will recognize your generosity in Safe Horizon's Annual Donor Listing, welcome you to an annual reception for Society members, and invite you to educational and social events with Safe Horizon staff and trustees.