

JOIN THE COMMUNITY WORKS LEGACY SOCIETY

Those of us who know and love Community Works have an opportunity to help secure a great future for our work.

When it's time to begin planning your estate, you think about the people and institutions that have played a role in your life. If you would like to make plans to leave a legacy gift to social and economic justice, please think of Community Works.

Planned Giving options are designed to help Community Works meet its outreach and mission initiatives, preserve our programs, and ensure a future for the benefit of those who follow us. By joining the Community Works Legacy Society, you can help future generations of social justice organizations benefit from the work of Community Works.

Two simple approaches include:

1. Leave a bequest in your will
2. Indicate Community Works as a Beneficiary on one of your financial accounts, such as life insurance or a savings account.

A popular type of planned gift is a bequest.

A bequest is. . .

- not payable until death, so it does not affect your assets or cash flow during your lifetime.
- private – your will is not filed or made public until your death.
- revocable – you can change the provisions in your will or trust at any time until death.

Example of language one can use to leave a dedicated amount in your will:

“I give ____ [\$ amount, description of property, or % of estate] to Community Works, a charitable corporation located at 25 West Street, Boston, MA, for its unrestricted use. (Community Works’ Federal ID is 04- 2762623)”

To join the Community Works Legacy Society or to discuss a legacy gift ...

Please contact Executive Director Fran Froehlich at fran@communityworks.com or call her at 617-423-9555

Please Note: You should always consult your financial advisor, accountant, or lawyer before making any donations of property, appreciated securities, or a substantial amount of cash.

Thank you for considering a Social Justice Legacy gift.

References

Downloadable handout (same content as webpage)

Writing a simple will (<http://www.usa.gov/topics/money/personal-finance/wills.shtml>)

Estate planning checklist

(<http://www.investopedia.com/articles/retirement/10/estate-planning-checklist.asp>)