



# Leave a Legacy of Safety

Dear **Friend**,

First, please let me express my gratitude for your consideration in joining the Emerge Legacy Circle. We would be honored to have you among this small group of dedicated donors, whose legacy will live on in supporting families who urgently need help, and through efforts to end domestic abuse at its roots.

We hope this guide will be helpful to you during your estate planning process with your financial advisor, estate planner or tax advisor. While we are happy to answer questions about Legacy Circle program, we cannot advise you about your tax-related or estate-related decisions.

To honor your level of investment as a member of the Emerge Legacy Circle, we will ensure you are kept up-to-date on all Emerge happenings through mailings, invitations and electronic communications (unless otherwise specified, of course!).

Again, thank you for **your dedication** to ending domestic abuse in our community. Your legacy will help our community become a safer place.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ed Mercurio-Sakwa', with a long horizontal flourish extending to the right.

Ed Mercurio-Sakwa  
CEO



## *Emerge! Legacy Circle*

### *Types of Legacy Gifts*

Planned gifts may be made in several ways and should be designed by a professional to maximize tax benefits for each donor. The easiest and most common gift is a bequest – making Emerge a beneficiary or partial beneficiary of:

- A Last Will and Testament
- A Life Insurance Policy; or
- A Retirement Plan (like an IRA)

However, other types of planned gifts may offer more tax advantages for some donors. Some of these gift types are designed to maximize the transfer of assets from one generation to another within the donor's family. Or they may be structured to provide a lifetime income to the donor. The Community Foundation of Southern Arizona offers these vehicles to donors who want to benefit Emerge.

Examples include:

- Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts

Some donors receive significant tax benefits by donating their primary residence to Emerge (and retain the right to live in their family home throughout their life and the life of their spouse, of course). Making a planned gift is different for everyone. Each gift should be tailored to fit the particular needs of that donor and his or her family.

**Before joining the Emerge! Legacy Circle, you should first consult an attorney, financial planner or tax advisor.** These professionals can help determine the type of planned gift that will result in the most benefit to the donor(s) and Emerge. We can provide them with specific information as needed.

### *Meeting with your Financial Advisor*

When meeting with an advisor regarding a planned gift to Emerge, the following information may be needed:

- Emerge! Center Against Domestic Abuse is a nonprofit 501(c)(3) organization.
- Emerge! Center Against Domestic Abuse's federal tax identification number is 86-0312162.



*Example language for a bequest:*

“A percentage of my estate \_\_\_\_\_ (or a set amount) is given to Tucson Centers for Women and Children, dba Emerge! Center Against Domestic Abuse, 2545 E. Adams, Tucson Arizona, for their work in the field of domestic abuse.”

#### *Stock Gifts*

If you would like to make a gift of stock, please contact Emerge for the details. We have an account at a brokerage firm and it is an easy process to transfer stock to us.

#### *How Your Planned Gifts Benefit Emerge!*

When a donor leaves a legacy gift for Emerge, we honor that legacy by investing in either **current strategic initiatives** to end domestic abuse in our community or **operating expenses** to ensure that survivors can continue to receive support at Emerge. Determination of how the legacy gift is invested depends on the amount of the legacy gift and the most urgent needs at the time it is received.

If you would prefer your legacy gift is designated to an endowment, or have any other questions or concerns, we would be happy to meet with you to discuss more in depth. Please don't hesitate to contact Emerge Director of Development at the contact information below:

**Lauryn Bianco**, Director of Development

p. 520-795-8001 x 7010

e: [laurynb@emergecenter.org](mailto:laurynb@emergecenter.org)



# Legacy Circle Membership Form

**This form is a notification/confirmation to Emerge that you are joining the Legacy Circle by leaving a planned gift for Emerge. It is not a legal document, and does not bind you in any way.**

I/We, \_\_\_\_\_, hereby indicate that I/we have established a gift to Emerge! Center Against Domestic Abuse through a planned or estate gift\*, as indicated below. I/We have consulted with a financial planner, tax advisor and/or an estate planner.

My/Our planned gift has been made through the following planned gift instrument:

- Bequest through Last Will & Testament
- Owner and Beneficiary of Life Insurance Policy
- Beneficiary of IRA or Other Retirement Account
- Gift of Real Estate
- Other \_\_\_\_\_

Name(s): \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

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

*Emerge's federal tax identification number is 86-0312162.*