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Leaving a Legacy of Service

Including QVS in your Estate Plans

Leaving a Legacy: Sharing your story

Why might a person include QVS in their estate plans? The reasons are many and vary from individual to individual. For most people a bequest or other form of planned gift is grounded in the desire to have a lasting impact on the lives of young people and the generations that follow.

When you make the decision to include QVS in your estate you are connecting your life and your life story to lives and stories of the young adults who will carry on the baton of work and service that is so deeply apart of our identity as a Quaker organization.

Sharing your story

When considering including QVS in your estate plans, we hope that you will share the story behind your decision with us. Is your decision grounded in an experience you had as a young adult, perhaps during a year of volunteer service or the influence someone who had a transformational impact on your life. Is your gift in honor of a loved one? Did a story we have shared remind you of a Friend who had a lasting impact on your life? Perhaps your gift is grounded in your desire to help shape the future of Friends through the establishment of a named endowment honoring the memory of a spouse or loved one?

Whatever the reason, we want to hear your story. Please share it with us. For more information about ways you can connect your story with the decision to include QVS in your estate plans, please contact us.

Legacy Giving: Options for Including QVS in your estate plans.

While legacy giving can be complicated, the reality is that most legacy gifts are made through the very simple process of naming a non-profit as a beneficiary of one's estate. Another very simple and convenient way to benefit QVS is through a charitable gift annuity.

Options for these two very popular forms of legacy giving are detailed below.

A Bequest in Support of QVS, Our Mission, and the Young Adults We Serve

A bequest is the simplest form of legacy gift and one that is very attractive for many people who value our work and want to have a lasting impact on future generations of young adult leaders.

Bequests may be in the form of cash, securities, real estate, an insurance policy, or other property. Sample language for including an unrestricted legacy gift to QVS in your estate plans is provided below.

Specific Bequest (Unrestricted): A gift through your estate for a specific amount of cash or property.

> *I devise and bequeath to Quaker Voluntary Service, a non-profit organization with administrative offices in Atlanta, Georgia _____ (insert specific dollar amount or description of property) to be used for the general purposes of Quaker Voluntary Service as determined by the Quaker Voluntary Service administration and governing board.*

Percentage Bequest (Unrestricted): A gift of a percent of an estate.

> *I devise and bequeath to Quaker Voluntary Service, a non-profit organization with administrative offices in Atlanta, Georgia, ____ percent of my estate to be used for the work and mission of Quaker Voluntary Service as determined by the Quaker Voluntary Service administration and governing board.*

Residual Bequest: A gift of whatever is left of an estate after other distributions.

> *I devise and bequeath to Quaker Voluntary Service, a non-profit organization with administrative offices in Atlanta, Georgia ____ (enter the word "all" or a percentage) of the rest of my estate, of whatever kind and wherever situated, for the work and mission of Quaker Voluntary Service as determined by the Quaker Voluntary Service administration and governing board.*

Language for a restricted bequest

Many people may want to establish a named endowment or to designate their gift for another restricted purpose. Given that the gift is actually received after the death of the donor, it is important that the wording for a restricted bequest be prepared in a way that both honors the intentions of the donor and meets the needs of QVS well into the future.

Please contact us if you are considering a restricted bequest. We would be glad to provide sample wording and discuss options that may be helpful.

A Charitable Gift Annuity: A legacy gift to QVS that provides life-time income to you

Another option you may want to consider is a Charitable Gift Annuity. This method of gifting benefits QVS upon your death while providing a fixed rate of income to you during your

lifetime. Income payments to you may in some cases be at a rate higher than those of other investments. The table below illustrates recent income payout rates for a single life gift annuity.

Two-life and deferred gift annuities are also available.

Charitable Gift Annuity Rate* Single-Life Illustration	
Age	% Rate
65	4.7
70	5.1
75	5.8
80	6.8
85	7.8
90	9.0

When your Charitable Gift Annuity is funded, you will receive an immediate charitable tax deduction for the "gift portion" of your Charitable Gift Annuity. When payments come to you or your chosen beneficiary a portion of that income is also tax-free. To further maximize tax benefits, you may wish to fund your Charitable Gift Annuity with appreciated assets. This source of funding may provide additional benefits through savings or capital gains tax.

The minimum gift to establish a Gift Annuity is $10,000. Quaker Voluntary Service has a working agreement with the Friends Fiduciary Corporation for the establishment of gift annuities where QVS is the named beneficiary.

For more information, please contact us for an application, sample illustration and up-to-date annuity rate information.

Other Planned Gift Options:

Other legacy gift options range from gifts of life insurance, an IRA and property to the establishment of a charitable trust. We will be glad to discuss these planned gift option with you and call on professionals with expertise in the planned gift field when necessary.

Please contact us:
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