



LEGACY of HEALING SOCIETY

The Legacy of Healing Society honors individuals who have chosen to invest in Houston's most vulnerable women and families with a planned gift benefiting The Women's Home.

A legacy gift to The Women's Home can change many lives now and in the future. When you include The Women's Home in your estate plans, you join a community of people who believe that every woman and her family deserve sacred spaces to live, heal, and the chance to reclaim their lives. Membership in The Legacy of Healing Society is open to supporters of all ages and all means. A legacy gift of any size ensures that The Women's Home can continue to provide for women and their families for generations to come.

"When a door closes on this life, I would like to think a door has opened for a woman at The Home." - Jim Drew, Legacy of Healing Member



In addition to the profound impact of a legacy gift, these types of gifts also offer significant estate and tax planning benefits. Thank you for considering making a legacy gift to The Women's Home that will ensure the organization can serve women and families in need well into the future. Our team, along with your financial advisor or attorney, can help you find the best way to make your gift that aligns with your goals and wishes.

**IT WOULD BE AN HONOR TO WELCOME YOU INTO THE
LEGACY OF HEALING SOCIETY.**

For more information, please contact Chief Development Officer, Julie Comiskey, at jcomiskey@thewomenshome.org or 713.328.1975.



TYPES OF PLANNED GIFTS

**Please speak with your financial advisor or attorney for personalized guidance on making a gift that aligns with your goals.*

GIFTS THAT REQUIRE NO MONEY NOW

BEQUESTS

By leaving The Women's Home in your will or living trust, your generosity will provide life changing Whole Life services to women and families at The Women's Home. You can designate a specific dollar amount, a percentage of your estate, or whatever remains after other bequests are satisfied.

LIFE INSURANCE

You may include The Women's Home as a beneficiary on an existing policy or donate an existing policy you no longer need outright to The Women's Home. In the second option, you may receive a charitable deduction roughly equal to the policy's cash surrender value.

RETIREMENT ASSETS

Donating all or part of your unused retirement assets – such as your IRA, 401(k), 403(b), pension or other tax-deferred plan—is an excellent way to support The Women's Home. If you are like most people, you probably will not use all your retirement assets during your lifetime.

GIFTS THAT PAY YOU AN INCOME

LEGACY IRA ACT GIVING/THE IRA GIFT (QCD)

The IRA charitable rollover (also called the Qualified Charitable Distribution, or QCD) is a wonderful way to make a tax-free gift to The Legacy of Healing Society. Beginning in 2023, those 70½ and older may elect to establish a charitable gift annuity (CGA) or a charitable remainder trust (CRT) by utilizing a QCD from an IRA. Both CGAs and CRTs return annual payments to the donor.

ADDITIONAL GIFTS

DONOR ADVISED FUND

The Donor Advised Fund (DAF) is an increasingly popular way to make a charitable gift. DAFs can provide you with immediate tax benefits while making your charitable giving easier. Here are two ways you can make a gift through your DAF:

- Make an outright gift now by recommending a grant to The Women's Home
- Create a succession plan to recommend that The Women's Home receive all or a portion of the fund value upon the termination of the fund.

ENDOWMENT

Gifts held in perpetuity and invested in a manner that protects the principal from inflation. These long-term gifts provide a secure source of future revenue.

IRA ROLLOVER

This is an annual option for individuals 70½ and older to transfer up to roughly \$111,000 directly from an IRA to The Women's Home without paying taxes on the distribution.

REAL ESTATE

Donating part or all of your appreciated real estate, such as a home, vacation property, undeveloped land, farmland, ranch or commercial property can make a great gift to The Women's Home. Your gift will generally be based on the property's fair market value, which must be established by an independent appraisal.

CHARITABLE LEAD TRUST

Charitable Lead Trust is an irrevocable trust designed to provide a steady income stream to The Women's Home or multiple charitable organizations for a set period, after which the remaining assets pass to heirs or back to the donor.