

THE LEGACY SOCIETY



GENEROSITY ACROSS GENERATIONS

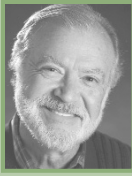
*“The greatest use of a life is to spend it
on something that will outlast it.”*

– William James



THE DALLAS FOUNDATION

Here for Good



GENEROSITY ACROSS GENERATIONS

THE DALLAS FOUNDATION

ESTABLISHED IN 1929, THE DALLAS FOUNDATION IS A PUBLICLY SUPPORTED COMMUNITY FOUNDATION CONSISTING OF NAMED CHARITABLE FUNDS ESTABLISHED BY MANY SEPARATE DONORS PRINCIPALLY FOR THE BENEFIT OF THE DALLAS AREA, ALTHOUGH THE FOUNDATION'S GRANTMAKING EXTENDS NATIONALLY.

WE ARE FUNDED BY INDIVIDUALS, FAMILIES, CORPORATIONS, AND NONPROFIT ORGANIZATIONS WHO COUNT ON US TO HELP THEM FULFILL THEIR FINANCIAL AND CHARITABLE GOALS. THE FOUNDATION'S ABILITY – BOTH TODAY AND TOMORROW – TO ASSIST A WIDE RANGE OF ORGANIZATIONS IS DUE IN LARGE PART TO THE GENEROSITY OF INDIVIDUALS LIKE YOU. BEQUESTS, LIFE INCOME GIFTS, AND OTHER CHARITABLE PLANNED GIFTS PROVIDE VITAL SUPPORT FOR OUR FUTURE EFFORTS TO IMPROVE THE QUALITY OF LIFE IN DALLAS.

*“To achieve greatness, start where you are,
use what you have, do what you can.”*

—Arthur Ashe

AN IMPORTANT DECISION

*P*LANNING YOUR ESTATE REQUIRES MANY DECISIONS:

■ Who should be in your will? ■ How can you provide for your loved ones? ■ How do you want to care for special property, like family heirlooms?

THERE ARE MANY OTHER QUESTIONS TO CONSIDER AS WELL:

■ Who will receive your personal legacy of charity? ■ How will you provide for the charitable causes you have always valued?

Many Dallas philanthropists are continuing their personal charitable legacies through a bequest or other deferred gift to The Dallas Foundation.

To recognize their generosity across generations,

the Foundation created its **LEGACY SOCIETY**.

THE LEGACY SOCIETY

The Legacy Society is a special way for us to acknowledge your partnership with us and honor your thoughtful gift planning. As a Legacy Society member, you will receive invitations to special events and briefings and recognition for your generosity in Foundation publications (unless you choose to be anonymous).

THE FOLLOWING KINDS OF GIFTS WILL QUALIFY FOR MEMBERSHIP IN THE LEGACY SOCIETY:

- Bequest through your will
- Charitable remainder trust
- Charitable lead trust
- Beneficiary designation on your IRA, 401(k) plan, or other retirement plan
- Life insurance policies
- Life estate
- Other deferred gifts



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TAKING CARE OF YOUR FAMILY

Understandably, your highest priorities are to provide adequately for yourself, and then to provide for your loved ones. These goals need not prevent you from giving to charity as well.

There are many ways to design your charitable giving to fulfill personal financial priorities. For example, in a charitable remainder trust, you can provide income for yourself or someone else, and then the balance comes to the Foundation. Miss Annie Stevens created a charitable remainder trust in 1941, providing a source of income to her niece for her life. When Miss Stevens' niece died in 1997, the Foundation started receiving income from the trust, which had grown from less than \$200,000 to more than \$11 million. We now make grants annually in

Miss Stevens' name to the causes she cared deeply about: disabled and neglected children, needy elderly persons, and three specific charities she had supported.

Another way to provide for your loved ones and still give to charity is a "residual bequest" to the Foundation. The Foundation will receive whatever is left over from your property only after all your specific gifts to others have been made.

In addition, you can structure a gift in a way that will involve your family in the future. You can set up a "donor advised fund" that allows your family or friends to recommend grants from your fund, carrying on your family's charitable heritage.

"The creation of a thousand forests is in one acorn."

– Ralph Waldo Emerson

YOUR GIFT CAN GROW

You might think that you have too small an estate to make a meaningful gift. Because of the power of a permanent endowment, your gift – of whatever size – will continue to grow over time. Our first donor, Sigmund Mayer, understood this. In 1934, he left the Foundation \$10,000 – less than 3% of his estate. He gave nearly all of his property to relatives in Germany, which they used to escape the country before World War II. Yet his gift to The Dallas Foundation was enough to get us started. We are now one of the largest foundations in Dallas. A gift of \$10,000 to the Foundation today could grow nearly six times its size in 50 years, provide \$50,000 in grants to the community – and keep on growing and giving in your name.

WHAT DO YOU WANT TO ACHIEVE?

Whether you want to give through a simple bequest, or a more complicated trust, what do you ultimately want to achieve through your gift? The Foundation offers several different kinds of funds to accommodate your interests.

IF YOU WANT TO:	YOU MIGHT CONSIDER A GIFT TO:
Provide for Dallas' future charitable needs	The Dallas Foundation's Unrestricted Fund, which awards competitive grants to agencies serving Dallas County
Support your favorite causes	A Field of Interest Fund that will award competitive grants in your areas of interest
Support a particular organization that you care about	A Designated Fund supporting one or more agencies forever, with the Foundation's oversight to make sure your wishes are always followed
Provide for the education of young people	A Scholarship Fund
Create a way for your family to join together to give	A Donor Advised Fund with your family members as advisors



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“How lovely to think that no one need wait a moment; we can start now, start slowly changing the world.”

– Anne Frank

WHAT DO YOU DO NOW?

*T*alk to your professional advisor about making a charitable gift. (You or your advisor may also contact the Foundation, with absolutely no obligation, to discuss the many different ways to structure an estate gift.) And then just let us know. We want to be able to tell you how much your generosity means to us and those you will be helping in the years to come. Please contact:

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900 JACKSON STREET, SUITE 705
DALLAS, TEXAS 75202
214.741.9898
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