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impact last?*

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What is the
Importance of
Legacy Giving?

What is the
Meaning of
Planned Giving?

A tough conversation to have . . .

All of us think about our mortality at one time or another—the people we will leave behind, how they will be cared for and making things easier for them to manage our estate. If we do not share our wishes, they may feel overwhelmed and wonder what to do. If we become incapacitated, the difficult decisions about our medical or estate wishes are now left to them.

Providing this information in advance and within an estate plan shows our love for them as well as for organizations we hold dear. With prudent planning, we can help our loved ones and accomplish our wishes.

The Pine Rest Foundation has created an online “Your Planning Library” to inform your estate planning process. Inside this newsletter is a guide to articles in the library. You can use this guide and print our articles as references for discussions with a family member. As hard as these discussions can be, it allows your loved one to have their planning arranged ahead of time, giving everyone peace of mind at a difficult time.

Meeting with an estate planning professional is a must when developing your plan and contemplating what should be included in its entirety. Please feel to reach out to me if you would like assistance with this process as I would be honored to assist.

Blessings!
Donald MacKenzie



Donald MacKenzie
Executive Director,
Pine Rest
Foundation

**“Immortality
is to live your
life doing good
things, and
leaving your
mark behind.”**

- Brandon Lee

A Guide to “Your Planning Library”

Estate planning can be confusing, stressful and just plain intimidating. But when you focus on the legacy you want to leave—the goals, needs and dreams you have for your family and Pine Rest Christian Mental Health Services—your decisions get a lot easier. We’re here to help you explore the planned giving topics that can make the biggest impact at the Foundation.

These articles are on our
Planned Giving website under
the “Resources and More” menu:
pinerest.planmygift.org

PROTECT YOUR FAMILY’S FUTURE



Estate Planning Starters

Find out how to start estate planning.

Estate Planning You Can Do at Home

Get a handle on your estate plan today.

Protect Your Pets After You Are Gone

Find out how to care for your pets after you are gone.

Navigating Estate Planning for Blended Families

Protect the people who matter most.

POPULAR WAYS TO GIVE



A Guide to Making Your Will

Learn what goes into a will and who should be involved.

Beneficiary Designations

See easy ways to leave your legacy.

17 Reasons to Update Your Will

Learn when to update a will if you already have one.

SIMPLE, FLEXIBLE GIFTS



Make the Most of Your Retirement Plan Assets

Explore how retirement plan assets make smart gifts.

Life Insurance: Expand Your Charitable Reach

Determine if you should give life insurance as a gift.

FOR DIFFICULT SITUATIONS



What to Do in the First 48 Hours After You Lose a Loved One

What should you do in the two days after someone passes?

When a Loved One Passes Away

What questions should you ask when a loved one passes away?

INCOME GIFTS



Charitable Gift Annuities: Gifts That Give Back

Find out how to make a gift that pays you back.

Deferred Gift Annuities: Plan Now, Benefit Later

See a gift you can give now and receive benefits from later.

Trusts: Choose From Two Ways to Donate

Discover two types of trusts and how they benefit you.

SMART WAYS TO GIVE



Ways to Donate Real Estate

Learn why real estate makes for tax-smart giving.

Endowments

Let us show you how to create a gift that keeps on giving.

Centralize Your Giving With Donor Advised Funds

We explain a fund built for diverse giving.

Maximize the Impact of Donor Advised Funds

Take your donor advised fund one step further to build a lasting legacy.

WHAT IS THE IMPORTANCE OF LEGACY GIVING?

Legacy giving helps people to extend the purpose and passion of their life. Leaving a legacy gift to a charitable organization allows the continuation of the life-changing work. This can continue your ability to help and positively impact people's lives into perpetuity.

WHAT IS THE MEANING OF PLANNED GIVING?

Planned giving is also referred to as gift planning or legacy giving. It is a donor's intention to contribute a major gift to an organization that will have a positive impact beyond their lifetime. An annual gift supports an organization's work now while a planned gift supports an organization's work now and far into the future.

TRADITIONAL WAYS TO DONATE

Wills & Living Trusts

Designating assets or money to Pine Rest Foundation in your will continues your legacy. This giving venue provides the flexibility to alter your will and giving wishes in case life decisions change.

With as little as one sentence in your will or trust, you can complete your gift. This type of donation can be specified as a percentage or exact monetary amount that helps ensure our mission continues for years to come.

Beneficiary Designations

Not everyone wants to commit to making a gift in their will or estate. Beneficiary designations are extremely easy to do and provide increased flexibility with IRAs, retirement plans, life insurance policies and other investment products.

GIFTS THAT PAY YOU INCOME

Charitable Gift Annuity

This type of donation can provide you with regular payments and allow us to further our life-changing work. You can also qualify for tax benefits depending on how you fund your gift.

Charitable Remainder Trust

If your estate has grown significantly but concerned about giving a gift or looking for ways to receive reliable income, consider a charitable remainder trust.

These types of gifts may offer you tax benefits and the option for income. There are several ways to receive payments and each has its own benefits: Annuity Trusts and Unitrusts.

OPTIONAL WAYS TO DONATE

IRA charitable rollover

Make a difference today and save on taxes. It's possible when you support Pine Rest Foundation through your IRA. Those taking Required Minimum Distributions (RMDs) from their IRA accounts can receive a tax benefit by giving directly to the non-profit. This gift option is commonly called the IRA charitable rollover or Qualified Charitable Distribution (QCD).

Donor Advised Funds

Donor-advised funds (DAF) have become increasingly popular as they offer the donor greater ease of administration while still allowing to maintain significant control over the placement and distribution of charitable gifts. There are tax advantages to managing your donations by using a DAF.

Consider a Grandparent Legacy Gift

Since these grandparenting years are such a rewarding time of life for most of us, why not do all we can to extend these years, enjoy them for as long as we can and continue making those key investments for our grandkids?

One way to do this is by supporting the Pine Rest Pediatric Center of Behavioral Health opening in 2026. With a naming opportunity though a current gift as well as a planned gift to the Pine Rest Endowment fund, you will ensure treatment is available for generations to come and help your legacy live on!

