

Your Planned Gift Can Change Lives Today...and For *Years to Come!*



There are multiple ways to give to BOSS through **Planned Giving**. Consider the following as long-term ways to give to BOSS as you and your household make important financial decisions:

- ◆ Bequests
- ◆ Life insurance
- ◆ Retirement plans, charitable trusts, IRAs
- ◆ Real estate
- ◆ Savings bonds
- ◆ In memory of / in honor of gifts

BOSS also gratefully accepts **employer matching contributions** and **online gifts**. To learn more, please contact Sonja at sfitz@self-sufficiency.org, or return the bottom sheet with the enclosed envelope.

Thank You for supporting our programs and participants!!

✂

Name: _____

Phone: _____

Email: _____

Best time to reach me: _____

I would like more information about: _____

Dan's Story

Dan first came to BOSS a dozen years ago when he was recruited for the Board of Directors by then-Executive Director boona cheema. Following a successful career with Clorox, in his retirement Dan wanted to devote his energy and resources to causes that would help people in the community who were in the most need. At the time, he was also on the Boards of the Oakland Workforce Collaborative and the Alameda County Food Bank.

After a couple of years in BOSS, Dan realized that the work of the organization was something he felt very strongly about — something he wanted to help further for as long as he could.

"I saw that there were other agencies also doing good work who had an easier time raising funds, like food banks" he says. "But in a lot of ways the work BOSS is doing is much more difficult—helping people who have no homes, no jobs, no support."

He decided to include BOSS in his will, with the creation of a fund that will bequeath a percentage of the total to BOSS annually, to support operating costs for years to come. He included the stipulation that in the event BOSS one day closed its doors, the Board would direct remaining funds to an agency of its choosing—one doing similar work.

"I really believe BOSS is serving people who are struggling the most—and though my contribution isn't huge, I want to be able to support its work even after I'm gone."

☐ **Yes, BOSS is *already* a part of my planned giving. I'd love to share my story** with other donors.

The **mission of BOSS** is to help homeless, poor and disabled people achieve health and self-sufficiency, and to fight against the root causes of poverty and homelessness. | www.self-sufficiency.org
1918 University Avenue, Berkeley, CA 94704
Ph (510) 649-1930, Fx (510) 649-0627



Planned Giving Options



- **BEQUEST** – Perhaps the most commonly known and most popular form of planned giving. Bequests require the addition of language to a will or trust that includes BOSS and the desired specifications. Consult your financial advisor or a probate attorney when drawing up a new will or trust.
- **BENEFICIARY DESIGNATIONS ON IRAs & RETIREMENT PLANS** – Name BOSS as the beneficiary on a retirement plan or IRA. To designate, obtain a beneficiary designation form from your financial planner or bank and name BOSS as the entire, or a percentage, of the asset.
- **CHARITABLE GIFT ANNUITIES** – These are contractual agreements between the donor and BOSS to transfer cash or other assets. Only nonprofits, such as BOSS, can offer charitable gift annuities, which offer a number of tax benefits.
- **LIFE INSURANCE** – Donors may give an existing policy no longer needed, fully or partially paid, or a new policy. Similar to an IRA and retirement plan designation, name BOSS as a beneficiary on the policy on the beneficiary designation form.
- **REAL ESTATE** – If you are considering donating real estate or non-cash donation, please contact BOSS first before completing any transaction. Contact Director of Development & Marketing Sonja Fitz at (510) 649-1930, ext. 1008.
- **SAVINGS BONDS** – Consider redeeming savings bonds, and then donating proceeds toward BOSS.
- **STOCK** – This is the most common non-cash gift. BOSS has an account at Schwab (acct#5498-2633, DTC# 0164) so you can donate stock any time. The stock transfer form is also available on BOSS's website (www.self-sufficiency.org) on the Donate page.
- **CHARITABLE LEAD TRUST (CRT)** – This is a trust arrangement that pays current annual income to BOSS for a certain period of years, with the trust principal reverting to the donor or the donor's family when the trust ends. Seek the assistance of an experienced estate planner before entering this type of arrangement.

For more information, consult your own financial advisor, or contact:

- **Virginia Palmer**, Wendel Rosen Black & Dean LLP – Trusts & Estates Practice Group, 510.834.6600
- **Jonathan DeYoe**, DeYoe Wealth Management, 510-848-0012 x 101 | Planned giving counsel not stand-alone service but provided as part of long-term financial planning/family success process
- **National Network of Estate Planning Attorneys**, <https://nnepa.com/>

BOSS Tax ID Number: 51-0173390

Building Opportunities for Self-Sufficiency (BOSS) | www.self-sufficiency.org
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