

RESPONSE FORM

NAME _____

ADDRESS _____

CITY _____

STATE _____ **ZIP CODE** _____

TELEPHONE _____

E-MAIL _____

___ I have remembered the N.Y. State & Bermuda Lions Foundation in my will

___ I wish to be listed in the Legacy Society roster and other publications as: _____

___ I wish to remain anonymous

ALWAYS SEEK PROFESSIONAL GUIDANCE SO THAT YOUR ESTATE PLAN REFLECTS YOUR INTENTIONS AND MEETS CURRENT FEDERAL AND STATE LAWS.

TYPES OF GRANTS MADE BY THE NYS & BLF

Humanitarian Assistance

Vocational Assistance

Operating Support Funds

Emergency Grants in Response to Natural Disasters

NOTE: Grants are not made to Individuals

For more information, please contact us at:

The New York State and Bermuda Lions Foundation, Inc.



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CREATING LEGACY GIFTS TO THE NEW YORK STATE AND BERMUDA LIONS FOUNDATION (NYS & BLF)

A 501(C)(3) Corporation



A UNIQUE OPPORTUNITY TO SUPPORT THE WORK OF DEDICATED LOCAL LIONS CLUBS AND THEIR MEMBERS TO ENRICH THE COMMUNITIES IN WHICH WE LIVE

A GROWING ENDOWMENT PROGRAM TO INCREASE AVAILABLE GRANT FUNDS FOR COMMUNITIES THROUGHOUT NEW YORK STATE AND BERMUDA

KNOWLEDGE THAT YOUR CONTRIBUTIONS ARE CAREFULLY MANAGED AND THAT GRANT FUNDS ARE ADMINISTERED WITH PROPER DUE DILIGENCE

WHAT IS THE PURPOSE OF OUR FOUNDATION?

The NYS & BLF, founded in 1992, is a not-for-profit 501(c)(3) organization through which funds are raised for specific service projects and programs solely within New York State and Bermuda. It is an officially endorsed project of the Lions Multiple District 20 which includes all Lions and Lions Clubs in New York and Bermuda.

These projects and activities are led by volunteers who are members of local community Lions Clubs who are also members of the International Association of Lions Clubs, an organization that includes over 1.35 million members in 207 countries and geographical areas worldwide.

The NYS & BLF, through its endowment, is able to provide matching funds for projects that are beyond the reach of individual Lions Clubs or Lions sub-districts because of local financial constraints or the scope of the project.

Communities throughout New York State and Bermuda are able to benefit from the collective efforts of the members of their local Lions Clubs and the NYS & BLF.

The NYS & BLF is a totally volunteer organization with no paid staff and minimal administrative expenses.

THE LIONS MOTTO: “WE SERVE”

YOUR PHILANTHROPIC LEGACY

Perhaps you’ve been a consistent financial supporter to a favorite charity, religious organization, historical organization or several other non-profit agencies that support your community in ways that you feel are important.

But you may not have considered donating to a charitable organization from your estate or from your IRA plan. There are several reasons to consider doing so:

1. Your estate may be able to make a gift significantly larger than you are able to afford while you needed the funds for living expenses.
2. You want to let your family know that the organization is important to you; perhaps it is an organization that they would want to support as well.
3. You want the recipient organization(s) to recognize that your legacy support is meant to make an impact on their operations and fund-raising efforts. Legacy gifts can often be “leveraged” by non-profits to solicit additional funding for their endowments or special projects.
4. Donations from larger estates may reduce estate taxes; consult your accountant or attorney about this.

THE NEW YORK STATE & BERMUDA LIONS FOUNDATION HAS AN ENDOWMENT OF OVER \$1,000,000 THAT PROVIDES GRANTS FOR SPECIAL PROJECTS THROUGHOUT NEW YORK AND BERMUDA. LEGACY GIFTS ARE USED TO GROW THIS ENDOWMENT AND INCREASE OUR GRANT FUNDING

LEGACY GIFTS TO THE NYS&BLF

What is “Planned Giving”?

It is a way to ensure that your philanthropic goals are part of your estate planning process.

How do you determine your gift intent?

1. Inventory your major assets
 - a. Home, land, real property
 - b. Stocks and bonds
 - c. Cash, including savings & CDs
 - d. Tangible property (automobiles, jewelry, antiques)
 - e. Annuities and other income sources
 - f. Retirement accounts such as IRAs, Keoghs and 401(k) plans
 - g. Life insurance
2. Determine ownership of the assets and plans for distribution
3. Calculate debts and subtract from assets
4. Factor in your legacy gift plans
 - a. Family, spouse, children
 - b. Long term care needs for spouse or special needs children
 - c. Favorite charities and bequests to those agencies where you wish to have a future impact and provide a legacy.

DO YOU HAVE AN ESTATE PLAN? DOES IT INCLUDE CHARITABLE GIVING?

You can be assured that your tax-deductible donations to the New York State & Bermuda Lions Foundation will have maximum impact supporting our sponsored community-based projects.