



PLANNED GIVING OPPORTUNITIES

Planned gifts are typically those that pass to charity through your estate after your death. You may make a provision in your estate plan directly to the **Pasadena Community Foundation (PCF)** or to any component fund of PCF. The Pasadena Community Foundation is a 501c3 public charity.

BEQUESTS

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift be made to family, friends and/or the Pasadena Community Foundation as part of your estate plan.

1. You can gift a specific dollar amount or asset
2. You can gift a percentage of your estate
3. You can gift from the balance or residue of your estate

NAMED BENEFICIARY OF CERTAIN ASSETS

Another way to leave a charitable gift from your estate is to designate the Pasadena Community Foundation as a full or partial beneficiary of certain assets such as a life insurance policy, an IRA or other retirement plan (401K, 403B, etc.).

WHAT IS UNIQUE ABOUT PCF?

Typically, a bequest made to PCF creates a named endowment fund that becomes a perpetual legacy for you or your loved ones. In partnership with your advisor, PCF helps you create a Statement of Purpose for the fund to be created in the future. We refer to them as Future Funds.

1. You may create a fund that supports PCF's local grant making in the greater Pasadena area. This fund can be unrestricted or restricted to an area of personal interest such as Arts & Culture, Environment, Education, Health, Human Services or Youth. Annual distributions from the endowment you create will get pooled with other endowments held by PCF to support local non-profits.
2. You may create a designated fund to support a specific charity. The endowment will be held by PCF and the annual distribution will support the charity in perpetuity.
3. You may create a fund in which your children become advisors to the charitable fund and recommend distributions from grants to charities anywhere in the U.S.—much like a family foundation but without the administrative burden.



PCF LEGACY SOCIETY

Those who make a provision in their estate plan to PCF will be recognized as a member of our Legacy Society. Legacy Society members are listed in our publications and website and invited to Foundation events such as our Local Heroes breakfast and our Legacy Luncheon.

