

LAURA'S HOUSE

Inspiring Hope and Empowering Change to End Domestic Violence

LEGACY SOCIETY

— *honoring those who care for our future* —

A Message From the CEO

Compassion, enthusiasm and vision are the driving forces behind Laura's House. It is through the support we receive from individuals like you that Laura's House is able to continue to provide safe places for individuals and families affected by domestic violence, while also serving as the prominent authority for domestic violence information.

As Laura's House moves forward continuing to meet the needs of the community, faces new challenges, your support will help us maintain our level of excellence and fulfill our ambitious goals for the future.

I invite you to demonstrate your care and concern for future generations in a significant and permanent way by joining Laura's Legacy Society.



Margaret Bayston
CEO and Executive Director



Farsighted Planning

Since 1994, Laura's House has been dedicated to healing lives affected by domestic violence and has experienced unparalleled growth since its inception. To ensure the future of the important work we do at Laura's House, we invite our friends and supporters to become members of Laura's Legacy Society.

Special Friends

Laura's Legacy Society is an extended family comprised of all those who have included Laura's House in their estate plans with a future gift through a bequest, life insurance, or trust arrangement, or have made an outright gift to the endowment fund. There will be an annual gathering of our "Special Friends" to honor those whose farsighted planning will provide a legacy of leadership for the future of Laura's House.

Honoring those caring and visionary individuals who are making a contribution to the future of Laura's House.



Endowment Fund

Legacy Society members plan their gifts to create endowment funds with Laura's House. Gifts to endowment funds are not spent. They serve as investment funds, or savings accounts, the income from which, in whole or in part, may be applied to budgeted operations in perpetuity. Each donor of an endowment fund, regardless of size, is an investor in helping to ensure the mission of Laura's House. Your gift may be made in your name or to memorialize a loved one.

This information is not intended as legal, tax or investment advice. For such advice, please consult an attorney, tax professional or investment professional.

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Tax ID# 33-0621826 · www.laurashouse.org      FOLLOW US!

Gift Planning

IF YOUR GOAL IS TO:	ASK US ABOUT:	AND CONSIDER THIS:
<ul style="list-style-type: none"> • Keep control of your assets throughout your life • Avoid estate taxation • Leave a philanthropic legacy 	Bequest	You can create a bequest through your will or trust stating a specific amount or percent of your estate or by changing the beneficiary on a life insurance policy, annuity or retirement account.
<ul style="list-style-type: none"> • Exchange low yielding assets for a fixed lifetime income that is partially tax exempt • Generate a current income tax deduction 	Charitable Gift Annuity	Income can begin immediately or be deferred to a later date when payments received are larger.
<ul style="list-style-type: none"> • Retain the right to live in your residence for life • Use the equity in your home to generate additional retirement income 	Life Estate Agreement Plus Charitable Gift Annuity	If your situation changes, you can rent the property to others OR exchange your life estate for cash or annuity income.
<ul style="list-style-type: none"> • Receive lifetime income with potential for growth • Avoid capital gains tax at sale of appreciated asset: real estate, stocks and mutual funds • Generate a current income tax deduction 	Charitable Remainder Unitrust	Year-to-year income varies with trust performance. Flexible design allows full income distributions at the start and increased cash flow at a future date.
<ul style="list-style-type: none"> • Assure your philanthropic legacy lives forever • Fund long-term programs, carrying family name and/or causes through the generations 	Endowment Gift	An endowment can be funded outright or by a multi-year pledge, bequest or designated remainder from either a trust (CRT) or annuity (CGA).
<ul style="list-style-type: none"> • Transfer assets to children or grandchildren over time while heavily discounting gift or estate taxes • Provide annual support to a charity for a term of years 	Charitable Lead Trust	This trust avoids "all the money at once" inheritance. Children/grandchildren receive lump sums deferred for special terms (5 years, 10 years, etc.)
<ul style="list-style-type: none"> • Have a predictable, fixed income not subject to market fluctuations • Avoid capital gains tax at sale 	Charitable Remainder Annuity Trust	Fixed income for life or set term of years (5, 10, 15 or 20) for short-term needs such as early retirement (first 10 years until Social Security/Pension starts) or college funding for heirs.
<ul style="list-style-type: none"> • Gift a life insurance policy which is no longer needed • Maximize the size of your testamentary charitable legacy 	Gift of Life Insurance	You can gift either a paid-up insurance policy or make annual gifts to Hoag to fund the ongoing premiums.
<ul style="list-style-type: none"> • Avoid double taxation (income and estate tax) or your IRA balance at death • Fund a charitable bequest 	Gift of IRA	Hoag can be a full or part beneficiary of your IRA account. Pending legislation may make lifetime transfers work.
<ul style="list-style-type: none"> • Avoid capital gains tax on a sale of stock, mutual funds or real estate • Generate tax deduction for full market value • See your philanthropy at work 	Outright Gift of an Appreciated Asset	Asset must be held long term (one year plus one day).
<ul style="list-style-type: none"> • Sell appreciated real estate for both cash and income • Generate a tax deduction to offset initial gain on cash income • Defer taxation on balance using installment sale treatment 	Installment Bargain Sale	This technique may be the best for indebted real estate.

My Response

I am pleased to inform you that I qualify for membership in the Legacy Society and am honored to be added to its membership.

I have included Laura's House in the following:

Direct Gift Life Insurance Bequest Retirement Funds Other _____

Please send me more information about how I can become a member of Laura's Legacy Society

Name(s) _____

Mailing Address _____

City _____ State _____ ZIP Code _____

Phone _____ E-Mail _____

Please Return To: Laura's House , 999 Corporate Drive, Suite 225, Ladera Ranch, CA 92694-2156