



## KERR LEGACY SOCIETY

Breathe New Hampshire's Dr. Robert B. Kerr Legacy Society is a group of thoughtful individuals who have included Breathe New Hampshire in their estate plans. This legacy society is named after our founder, Dr. Robert B. Kerr, who dedicated his life to lung health through his 50 years of service with this organization. Just like Dr. Kerr, members are helping to improve and save lives by eliminating lung disease.

As a member of the Dr. Robert B. Kerr Legacy Society, you may elect to keep your membership anonymous, or be included in the promotion of the Dr. Robert B. Kerr Legacy Society through materials such as newsletters and annual reports and an announcement at our annual Night of Thanks. Our public acknowledgement allows us to recognize you and it provides a unique opportunity for your leadership to inspire others to learn more about how they can make a difference.

### OUR MISSION

To eliminate lung disease and improve the quality of life for those living with lung disease in New Hampshire.

### ABOUT US

Breathe New Hampshire is a well-established, 501(c)3 non-profit organization that has become an integral part of New Hampshire's public health landscape, focusing on critical issues related to lung health, such as tobacco use, COPD (chronic obstructive pulmonary disease), asthma, air quality and lung cancer. We provide educational programs, and support public health advocacy and scientific research focused on preventing, eliminating, and treating lung disease through the Mary Fuller Russell Research Fund.



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PLACE  
STAMP  
HERE



# CHARITABLE GIFT PLANNING

Creating a legacy through your will or trust.



SOMEONE'S SITTING IN THE SHADE TODAY  
BECAUSE SOMEONE PLANTED A TREE  
A LONG TIME AGO.

- Warren Buffett



## MAKE A GIFT THAT COSTS NOTHING DURING YOUR LIFETIME

Planned giving, sometimes referred to as gift planning, refers to charitable gifts given to a non-profit that requires some planning before they are made. Planned Gifts often allow a donor to make larger gifts than they could make from their income. While some planned gifts provide a lifelong income to the donor, others use estate and tax planning techniques to provide for charity and other heirs in ways that maximize the gift and/or minimize its impact on the donor's estate.

Whether a donor uses cash, appreciated securities/stock, real estate, artwork, partnership interests, personal property, life insurance, a retirement plan, etc., the benefits of funding a planned gift can make this type of charitable giving very attractive to both donor and charity.

## BEQUESTS & WILLS

Did you know that 55% of the population do not have wills? A will or bequest is a meaningful way to support our work without affecting your cash flow during your lifetime. The simplest way to make a planned gift is by naming BreatheNew Hampshire in your will. Your attorney can include it when you prepare or revise your will. Some suggested wording to share with your attorney:

*After fulfilling all other provisions, I give, bequeath and devise \_\_\_% of the remainder (or \$\_\_\_\_\_ if a specific amount) to Breathe New Hampshire, a New Hampshire charitable organization with offices at 145 Hollis Street, Unit C, Manchester, NH 03101. Tax ID 02-0222170*

## LIFE INSURANCE & RETIREMENT ACCOUNTS

Life insurance is another way to make a sizeable gift to Breathe New Hampshire. You can make Breathe New Hampshire the beneficiary of an existing policy, or name Breathe New Hampshire to receive the proceeds of the policy if the designated beneficiaries predecease the insured. The current value of the policy is tax deductible, as are future premium payments.

Also, the remainder value of many retirement accounts can be heavily taxed when left to friends and family, but pass tax-free to Breathe New Hampshire upon your death.

## CHARITABLE REMAINDER TRUSTS

A charitable remainder trust is a way to achieve your current and long-term financial, estate and philanthropic goals. A donor makes an irrevocable transfer of cash, stock, real estate or other assets to a trust which produces income for the donor or other beneficiaries, either for a fixed period of time of up to twenty years or until the donor or other beneficiary dies. At the conclusion of the trust period, the remaining principal assets will be distributed to Breathe New Hampshire. This allows you to claim a tax deduction for the estimated portion of the assets that will ultimately go to Breathe New Hampshire upon death or the expiration of the fixed period.

*Disclaimer: Information provided in this brochure is a general guide to planned giving strategies and how donors may maximize their support while respecting your current financial needs. We encourage you to consult with a lawyer or financial advisor to explore which opportunity might be best for you. No part of this booklet is intended as legal advice.*

## CHARITABLE LEAD TRUSTS

Like a charitable remainder trust, a charitable lead trust can provide support for Breathe New Hampshire and significant tax benefits to the donor. But it differs in important ways from charitable remainder trusts. In brief, a charitable lead trust can make gifts to Breathe New Hampshire for either a specific number of years or for the donor's lifetime. At the end of this period, the remaining assets in the trust and any growth it has realized are typically passed to the donor's heirs. Although there is no income tax deduction when you create a charitable lead trust, your gift or estate tax is greatly reduced and any growth is passed on gift and estate tax free.

### I'M INTERESTED IN LEARNING MORE.

NAME \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

E-MAIL \_\_\_\_\_

PHONE \_\_\_\_\_

- I would like someone to contact me regarding a private and confidential visit about planning a gift from my estate.
- In confidence, I have already included Breathe New Hampshire in my will.
- Use my e-mail to reach me.
- Use my phone to reach me.

