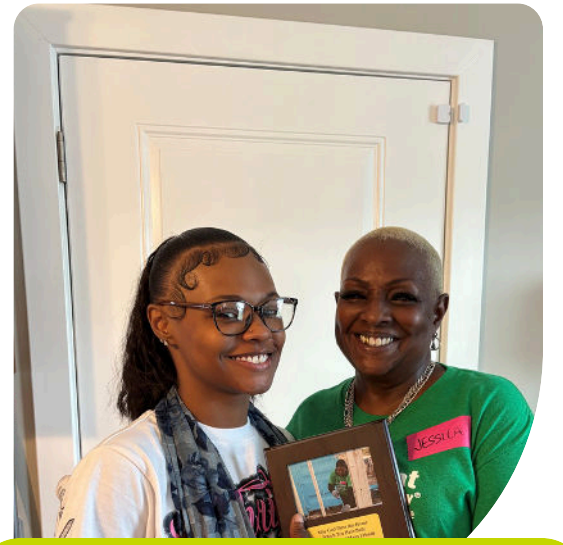

## Open New Doors

Through legacy giving, you can impact health, education, and affordable homeownership opportunities for families and individuals in our community.

## Legacy Society

With your planned gift, no matter the size, you'll join other Habitat friends as a member of the Legacy Society. Benefits include:

- Continuation of your important support to help provide affordable homeonwership
- Recognition in the Habitat Annual Report and Newsletter
- Invitaion to and recognition at the Annual Legacy Society Home Dedication
- Invites to special events

Legacy giving lets you donate to Habitat for Humanity of Metro Louisville in a manner that is consistent with your ability and goals.

With careful planning, you will be able to establish a meaningful legacy that provides affordable homeownership for your neighbors in need into the future.

## Want to Learn More?

Visit our Legacy Giving Page:
louisvillehabiat.org/support-us/legacy-society

Giving Docs

Through Giving Docs, you can create or update estate planning vehicles such as a will, donor advised funds, and beneficiary designations for retirement accounts, investment accounts, bank accounts, CDs, or life insurance policies.

Visit Our Free Giving Docs Estate Planning Tool:
givingdocs.com/louisvillehabitat

# Leave Your Legacy

**by multiplying the impact of your giving**

Habitat for Humanity® of Metro Louisville

## What legacy do YOU want to leave?

Do you hope for a community with healthier kids, greater academics, stronger neighborhoods and affordable homeownership opportunities for families and individuals?

Your planned gift to Habitat for Humanity of Metro Louisville will create a lasting impact in all of these areas, and beyond. Habitat homeowners are strong, stable, and self-reliant; and they pass these virtues on to their children.

Today, building on decades of proven success, Louisville Habitat is poised to expand affordable homeownership opportunities for local families for generations to come.

**Your planned gift can be the key that unlocks amazing potential.**

## Ways To Multiply Your Legacy

**Bequests**

Make a bequest by having an attorney or advisor include this language in your will or trust:

*I give, devise and bequeath to Habitat for Humanity of Metro Louisville, a non-profit corporation located at 1620 Bank Street, Louisville, KY, 40203,*

***Tax ID: #58-1735528***

- *_____% of my estate*
- *the sum of _____*
- *_____% of the residue of my estate as an unrestricted gift*

**Investment Assets**

Gifts of stocks, bonds, and mutual funds may provide significant tax advantages and can be given during your lifetime and in your will.

**Retirement Assets**

IRAs and 401(k)s may be heavily taxed when inherited. Ask your account custodian for a beneficiary designation form to name Habitat for Humanity of Metro Louisville.

**Life Insurance**

Habitat for Humanity of Metro Louisville can be named as the sole, partial, or contingent beneficiary of a policy. This may translate into a large gift (and tax deduction) with little cost to you.

**Real Estate**

Giving a home or land supports our mission and may provide excellent tax benefits.

## Legacy Society

### Member Information

_____

Name(s)

_____

Address

_____

City State Zip Code

_____

Preferred Phone

_____

Preferred Email

### Gift Information

I/We have made a provision to leave a legacy to Habitat for Humanity of Metro Louisville through my our/our:

- ☐ Will
- ☐ Trust
- ☐ Retirement Plan or IRA
- ☐ Life Insurane Policy
- ☐ Charitable Gift Annuity
- ☐ Other_____

### Gift Recognition

Louisville Habitat may publish my name in the list of Legacy Society members as motivation for others to make a planned gift.

_____

Name(s) as you wish to be listed, ex. Jane and John Doe

☐ I/We prefer that my/our gift be anonymous

**Mail this form to Louisville Habitat:**
**1620 Bank Street, Louisville, KY 40203**
Questions? Contact info@louisvillehabitat.org or 502-637-6265