

# Make a *lasting impact* with a planned gift



**GREATER  
CINCINNATI  
FOUNDATION**



# Create a *legacy* that supports the community you love

As someone who cares deeply about your community, you have the opportunity to make a lasting difference through a planned gift through Greater Cincinnati Foundation.

Planned giving allows you to support the causes that matter most to you—education, the arts, healthcare, the environment, basic needs, or anything close to your heart—while also meeting your financial and personal goals.

Setting up a fund for the future at GCF will integrate your philanthropic goals into your overall estate and financial planning, offering you the opportunity to support meaningful causes and organizations long into the future, while also providing potential financial and tax benefits for you and your loved ones.

## What is a Planned Gift?

Planned gifts are contributions made as part of your overall financial or estate plan. Most often they are arranged now and fulfilled later, typically through your will, trust, retirement account, insurance policy, or other payable-on-death designation.

## Benefits of Planned Giving

- Make a bigger impact than might be possible during your lifetime
- Support your favorite causes or charities with a gift aligned to your values
- Create a lasting legacy for future generations
- Enjoy potential tax advantages and peace of mind

# Capture your intent with a *future fund* agreement

When you name Greater Cincinnati Foundation in your estate plans, we invite you to meet with us to design a **Future Fund Agreement**. This simple, flexible document outlines how you would like your future gift to be used—whether you want to support a specific cause, nonprofit, scholarship, or provide unrestricted support to meet evolving community needs.

## Creating this document:

- Clarifies your charitable wishes now, while you're available to guide us
- Ensures your legacy is honored exactly as you envision
- Provides flexibility—you can update it anytime, without changing your estate plan
- Gives you peace of mind that your future fund is aligned with your charitable intent
- Encourages family involvement by engaging loved ones in decision making about causes to support
- Gives you the ability to name family members to advise the fund

There's no cost, no legal obligation to fulfill the gift, and no minimum gift required. It's simply a way to be thoughtful and intentional about your legacy.



## Ways to *give*

### Bequest in a Will or Living Trust

Designate Greater Cincinnati Foundation as a beneficiary of a specific dollar amount, a percentage of your estate, or the remainder after other gifts are made.

Below are simple and flexible ways to make a planned gift:

### Beneficiary Designations

You can name Greater Cincinnati Foundation as a beneficiary of:

- Retirement plans (IRA, 401(k), 403(b))
- Life insurance policies
- Bank or brokerage accounts
- Donor advised funds

### Other Gifts

We are happy to work with your attorneys, financial advisors, and accountants to explore gifts through charitable trusts, gifts of business interests, real estate, or other tools that align with your estate and financial goals.



Did you know you can change your future fund agreement as your charitable interests evolve - without touching your original estate planning documents?

## Your *legacy*, our commitment

At GCF, we work closely with you and your professional advisors to ensure your legacy is structured exactly the way you envision.

As your trusted philanthropic partner, we provide:

- Expert guidance on charitable options
- Professional fund management
- Stewardship and accountability
- Enduring support for the community you love

## Let's start the *conversation*

Your legacy can be powerful. We would be honored to help you explore how planned giving can help you shape the future of our community.



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