

Yes! I would like to learn more
about planning a gift for Lighthouse of Pinellas.

Please send additional information about:

- Bequests
- Charitable Gift Annuities (CGA)
- Beneficiary Designations
- Qualified Charitable Distributions (QCD)
- Other _____

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

Please detach and mail to:

Lighthouse of Pinellas
Planned Giving
6925 112th Circle N., Ste. 103
Largo, FL 33773

LIGHTHOUSE OF PINELLAS, INC. IS A NONPROFIT 501(C)(3), FEDERAL TAX ID #23-7042938. WE ARE REGISTERED WITH THE STATE #CH1744 UNDER THE SOLICITATION OF CONTRIBUTIONS ACT. "A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE 1-800-HELP-FLA (435-7352) OR www.800helpfla.com. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE."

Watson Legacy Society

The Lighthouse of Pinellas established the Watson Legacy Society to honor the generosity and vision of those donors who make a meaningful contribution through the lasting impact of a planned gift.

Benefits of joining the Watson Legacy Society

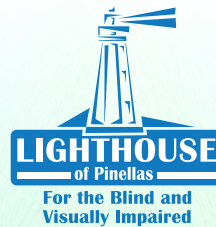
- Permanent recognition on the Watson Legacy Society Wall of Honor
- Invitation to an annual legacy society recognition reception
- Invitation to a pre-event reception prior to the Lighthouse of Pinellas Point of Light Luncheon
- Recognition in the Lighthouse of Pinellas Annual Report and other donor publications
- Invitation to a behind-the-scenes tour of the Lighthouse of Pinellas and any programs of special interest to you
- The knowledge your gift will directly benefit the clients at Lighthouse of Pinellas

By completing a statement of intent and notifying us of your gift through a bequest, beneficiary designation, charitable gift annuity or other planned gift, you can begin to receive the benefits of legacy society membership and the satisfaction of knowing that you are making a gift of a lifetime.



Planned Giving Guide

Creating a Legacy of Hope



6925 112th Circle North, Suite 103, Largo, FL 33773

Phone: (727) 544-4433

Fax (727) 544-5511

www.lhpfl.org

Arranging for a planned gift allows you to make a meaningful difference in the lives of people who are visually impaired, while taking advantage of unique tax savings or income benefits. A planned gift to the Lighthouse of Pinellas is an option for donors at all income levels. Even if you can't make a sizable gift today, through a planned gift, you can have a profound impact on how people with vision impairment receive services tomorrow.

Bequests

A bequest is a gift planned during your lifetime through your will or a living trust. If you already have a will, your attorney can amend your current plans with an easy addition. You can choose to leave a specific amount or a percentage of your estate to Lighthouse of Pinellas.

Charitable Gift Annuities (CGA)

If the idea of receiving an additional fixed income for life is appealing to you, you may want to learn more about a CGA. You will immediately receive a tax deduction plus a set income for your lifetime, and the Lighthouse of Pinellas will receive the balance at the end of its term. It is literally the gift that keeps on giving!

If you would like to learn more about planned giving, please contact the Development Office at (727) 544-4433.

Interested? With planned giving, you have many options. Below are a few of the most common vehicles used by donors.

Beneficiary Designations

Consider making Lighthouse of Pinellas the beneficiary on retirement plans, insurance policies or bank accounts. Each has benefits that may work to meet your goals.

Insurance plans - You can donate a policy you already own that no longer serves its original purpose, purchase a policy to specifically benefit the Lighthouse of Pinellas, or name the Lighthouse as a primary or contingent beneficiary on a current policy.

Retirement plans - Retirement assets are different from most other assets a person owns. At death, most retirement plans are subject to an estate tax and income tax. Because income tax is levied on most retirement plan assets when they are transferred, those holdings are ideal to fund a charitable gift when you no longer need them.

Qualified Charitable Distribution (QCD) from an IRA

If you are age 70 ½ or older, you may benefit from a QCD. Amounts distributed as a QCD can be counted toward satisfying your Required Minimum Distribution (RMD) for the year, up to \$100,000, and can also be excluded from your taxable income. There is little paperwork required. Just ask your IRA custodian to direct transfer of funds from your IRA, payable to the Lighthouse of Pinellas.

These giving vehicles are simply an overview of your options to carry on your legacy beyond your lifetime – and in some cases, now. They are not intended to constitute tax, accounting or legal advice. If you choose to leave a planned gift to support the programs and services of the Lighthouse of Pinellas, please consult your professional advisors regarding your values and priorities.

Once you have consulted with your advisors, please let us know about your intent to benefit the Lighthouse. We would love to be able to honor your gift today by including you on our Watson Legacy Wall at our facility.

Mission Statement

Our mission is to advance the independence and quality of life for individuals in Pinellas County who are blind or visually impaired.

The Watson Legacy Society was named in memory of Muriel and John Watson, who were instrumental in founding the Lighthouse. Mrs. Watson is responsible for raising over \$3 million for our nonprofit and was a passionate advocate for people of all ages with vision impairment.