



# PLANNED GIVING

***Leave a  
Legacy of Stability***



**Help children, youth,  
and families thrive for  
generations to come.**

For nearly five decades, Alternative Family Services (AFS) has helped children, youth, and families build safer, healthier futures through compassionate, community-based support.

A legacy gift is a meaningful way to carry your values forward and help ensure this work continues for years to come.



[www.afs4kids.org](http://www.afs4kids.org)

## AFS PLANNED GIVING OPTIONS

- **Bequest in Your Will or Trust**
- **Retirement Account Beneficiary Designation**
- **IRA Charitable Giving (Qualified Charitable Distribution)**
- **Life Insurance Beneficiary Designation**
- **Donor-Advised Fund (DAF) Successor or Beneficiary Designation**
- **Gifts of Stock**

This information is provided for educational purposes only and is not legal or tax advice. Please consult your professional advisor before making estate or financial planning decisions.

# Trusted Stewardship



AFS is committed to stewarding donor support with care and accountability, so your generosity creates meaningful impact over time. Your legacy gift can support AFS clients where the need is the greatest such as:

- ✓ **Mental Health & Therapeutic Services**
- ✓ **Transition-age Youth Support**
- ✓ **Family-centered Programs & Essential Needs**
- ✓ **Permanency Services**

## Why Leave a Legacy at AFS?

When you include AFS in your estate plans, you help sustain a mission rooted in:

- **STABILITY** for children and families
- **SAFETY** through trauma-informed, compassionate care
- **WELLBEING** through individualized support and long-term connection

## FAQs

### Who can leave a legacy gift?

Many legacy gifts are made through simple beneficiary designations or a percentage in a will or trust.

### Can I change my mind later?

Yes. Most planned gifts can be changed if your circumstances or priorities change.

### Can my gift support AFS where it's needed most?

Yes. AFS encourages unrestricted legacy gifts so future leaders can respond to the most urgent needs.

### Can I direct my gift to a specific program?

Possibly. We recommend contacting AFS first to discuss any program-specific intentions, so we can help ensure your wishes are honored.

### Does AFS provide legal or tax advice?

No. AFS does not provide legal or tax advice. Please consult your attorney, financial advisor, or tax professional.

# Ways to Leave a Legacy

Many planned gifts are easy to set up and can be updated at any time.



## ✓ **Bequest in Your Will or Trust**

The most common type of legacy gift. You can leave:

- a specific amount
- a percentage of your estate
- or what remains after other gifts are distributed

## ✓ **Retirement Account Beneficiary Designation**

- You can name AFS as a beneficiary of all or part of an IRA, 401(k), or other retirement account.
- Simply by updating a beneficiary form, this is often one of the easiest ways to make a future gift.

## ✓ **IRA Charitable Giving (Qualified Charitable Distribution)**

- If you are 70½ or older, you may be able to make a tax-advantaged gift directly from your IRA to AFS during your lifetime.
- This is not a future estate gift, but many donors include this option as part of their legacy planning.

## ✓ **Life Insurance Beneficiary Designation**

- You can name AFS as a beneficiary of an existing life insurance policy, or transfer ownership of a policy in some cases.

## ✓ **Donor-Advised Fund (DAF) Successor or Beneficiary Designation**

- If you have a donor-advised fund, you may be able to recommend AFS as a beneficiary of the remaining fund balance.

## ✓ **Gifts of Stock**

- You may choose to make a gift of appreciated stock or securities to support AFS.
- Some donors also include charitable giving strategies involving investment accounts as part of their long-term planning.

**AFS can provide its legal name, tax ID number, and mailing information for your attorney or advisor.**

## **AFS Legacy Giving Circle**



If you have included AFS in your estate plans, we invite you to let us know. With your permission, we would be honored to recognize you as a member of the AFS Legacy Giving Circle. You may also choose to remain anonymous.

**Contact the AFS Development Department at: [development@afs4kids.org](mailto:development@afs4kids.org)**

# How to Get Started

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Every legacy begins with a simple decision: to make your values endure.

By including AFS in your plans, you can help ensure that children, youth, and families continue to receive the stability, safety, and support they need—well into the future.



## CONTACT

AFS Development Department  
[development@afs4kids.org](mailto:development@afs4kids.org)

[www.afs4kids.org](http://www.afs4kids.org)

## STEP 1 Consider the legacy you want to create

Many donors choose to leave a gift to AFS because they want to reflect their values and support children and families long into the future.

## STEP 2 Speak with your advisor

Your attorney, financial advisor, or tax professional can help you choose the giving option that fits your goals.

## STEP 3 Let AFS know (optional but helpful)

If you choose to include AFS in your plans, we'd be honored to know so we can thank you, answer questions, and ensure your gift intent is understood.

