



Creating a Legacy

West Haven Community House Named Funds

Please consider creating a named fund in honor or in memory of someone. A named fund can be created with a contribution starting at \$5,000. When you are ready, please contact the Development Office with the information below.

Named Funds are recognized annually at a meeting of the Board of Directors in June.

FUND OWNER/DONOR INFORMATION

First Name _____

Last Name _____

Address _____

City/State/Zip _____

Phone _____ Cell Phone _____

Email _____

Enclosed is my tax-deductible Named Fund gift of \$ _____

The Fund Name will be:

In Honor of: _____

In Memory of: _____

Other: _____

Short Description

Funds should be restricted for the following program:

None – Overall use by West Haven Community House

Children & Youth Services Community Connections Head Start

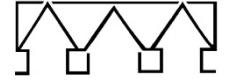
SECONDARY CONTACT:

NAME: _____

PHONE: _____



Leaving a Charitable Remainder Trust (CRT) Benefitting the West Haven Community House



Giving to the West Haven Community House Endowment Fund via the creation of a personal Charitable Remainder Trust allows the donor to receive income for the rest of their life, knowing that whatever remains will benefit the community via the good work done by the West Haven Community House.

How it works

- You transfer cash, appreciated stocks, real estate, or other assets into a trust set up by your attorney or accountant.
- You receive an immediate charitable tax deduction for the charitable portion of your trust.
- The trust pays you or a beneficiary you designate regular income payments.
- Upon the beneficiary's death or after a defined period of years, the remaining assets in the trust transfer to the West Haven Community House Endowment Fund.
- We set up a fund in your name, in the name of your family or business, or in honor of any person or organization that you choose.
- We handle all the administrative details after the fund is established.
- Your gift is placed into the West Haven Community House Endowment Fund that is invested over time. Earnings from the fund support the ongoing work of the agency. Your gift - and all future earnings from your gift - is a permanent source of community capital, helping to do good work forever.

More Benefits

You may choose to receive a fixed income or one that changes with market conditions - income from the Charitable Remainder Trust you establish may add up to more than the interest and dividends you earned from holding the assets. You can use it to supplement your own lifestyle or that of someone other than yourself: a sibling, a dependent parent, or a friend. You can pick one of these options for your charitable remainder trust:

- **Annuity trust** pays you a fixed dollar amount.
- **Standard unitrust** pays you an amount equal to a fixed percentage of the net fair market of the trust and is recalculated annually.
- **Net income unitrust** pays you the lesser of the fixed percentage specified by the trust agreement or actual trust income; some net income unitrusts allow you to make up deficiencies in previous years.
- **Flip unitrust** is a net income unitrust that converts to a standard unitrust upon a triggering event, such as the sale of an asset used to fund the trust.

Stock Transfers



The Transfer of Stocks are coordinated between the WHCH Finance Department and The Community Foundation for Greater New Haven.

Please notify the Development Office of your intentions. The information you will need is :



The **COMMUNITY** Foundation *for* Greater New Haven

Electronic Transfer Instructions for Stock Gifts

We appreciate your interest in making a gift of securities through The Community Foundation *for* Greater New Haven. Following the instructions below will help ensure that your gift is processed in a timely manner and accurately directed to your desired use.

1. Prior to transferring shares, please contact The Community Foundation and provide the following information:
 - a. Name of your broker and firm assisting with the transfer
 - b. Stock name and number of shares
 - c. How you would like this gift to be used (i.e., the fund or purpose to which the gift should be directed for the West Haven Community House)
2. Please advise us, directly or through your broker, when the stock transfer is complete. Once the gift is received and processed by The Community Foundation, a gift acknowledgement letter will be sent to you.

The Community Foundation for Greater New Haven Contact Information:

Ms. Linda Estacion

Director of Donor Services and Development Operations Phone Number: 203-777-7069

Email: lestacion@cfgnh.org

The Community Foundation for Greater New Haven Brokerage Account Options:

Merrill Lynch/Bank of America Account

Number: 81204182

DTC Number: 8862

Contact Person: Alex Santacroce Phone

Number: 203-789-2405

Fax Number: 203-826-2248

UBS

Account Number: LH39063 DTC

Number: 0221

Contact Person: Denise Rasicot Phone

Number: 203-498-3327

Fax Number: 855-249-231

