

You're invited...

to join the ranks of Solano County's most generous and forward-thinking residents as a member of the Legacy Society of Solano Community Foundation.

Members of the Legacy Society have one thing in common: all have made a commitment to support the future of their community through an estate gift to Solano Community Foundation.

They have other things in common as well. They have worked hard, saved wisely and invested well. They understand the power of endowment. And they know that the assets they leave to the community will continue to grow, supporting good works for generations to come.



Photos courtesy of Daily Republic

A lasting legacy

An endowed fund at Solano Community Foundation

dates to 1969, when Leslie and Virginia May Anderson created a charitable trust in their estate plan. Leslie, a decorated World War I veteran, and Virginia, his bride, had no heirs, but great affection for the youth of their community in Solano County. Upon Virginia's death in 1989, the Leslie Anderson and Virginia May Anderson Fund was endowed with nearly \$500,000. For 18 years, a trustee and distribution committee fulfilled the couple's legacy with annual grants for youth.

By 2007, the Anderson Trust had grown to \$2.3 million, and trusteeship was transferred to the Solano Community Foundation. Youth in Solano County continue to benefit from the generosity of this forward-thinking, community-minded couple—and will forever. This is the real meaning of "legacy."

Since 1989, the trust has generated more than \$2 million in grants. The Anderson Trust also requires the trustee to place flowers on the Andersons' graves and those of ten other close friends on Easter, Memorial Day, and Christmas. A Solano Community Foundation representative now makes a trip to the Fairfield and Rockville cemeteries on those holidays to respectfully and gratefully lay bouquets of fresh flowers on their graves—a tradition that will carry on forever.

Solano Community Foundation
1261 Travis Boulevard, Suite 320
Fairfield, CA 94533

tel (707) 399.3846
fax (707) 399.3849
swolf@solanocf.org
www.solanocf.org



Confirmed in compliance with National Standards
for U.S. Community Foundations



Legacy Society



For good. For ever. For Solano County.

When you join the Legacy Society of Solano Community Foundation, you'll find uncommon opportunities to remember, share, and connect. You'll be invited to:

Name your charitable fund. We encourage you to use your gift to honor the name of your family or loved ones. You may, of course, choose anonymity instead.

Share your personal history. We'd like to preserve your story and photographs for future generations who will receive grants from your fund.

Attend special community events. We'll introduce you to other generous people who have also provided for Solano County's future in their estate plans.

Learn of changes in California probate or federal tax law. We want to help you make sure your estate plan continues to accomplish your financial and charitable objectives.

Be named in Solano Community Foundation publications. We'd like to give others the opportunity to follow your example of community stewardship and leadership. (We also respect the wishes of those who prefer to give anonymously.)

Your planned gift or bequest puts you in good company today. Tomorrow, your gift will do good works in our communities for generations to come.

Thank you for preserving a portion of your estate for your community—for good, forever.



Questions & answers

Why do people give to charity through their estate plans?

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, these include preserving the family name, honoring loved ones, providing for heirs, minimizing tax burdens, and supporting the community they call home. Bequests to the community foundation are exempt from estate taxes.

Who can make a legacy gift?

Anyone with a desire to give can make a legacy gift. Many people give assets including IRAs, securities, real estate, insurance benefits, and cash. Many are surprised to learn how easy it is to create a lasting legacy. We invest the principal and make grants from the income, handling all administrative tasks.

What good work can I do with my legacy gift?

You can support the arts, enrich education, protect the environment, provide human services, safeguard health, foster a stronger community... and more. Tell us what is important to you.

When should I include the gift in my estate plan?

Any time you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your financial or legal advisor can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes, and other considerations. When you notify us of the gift, you automatically become a member of the Legacy Society.

Where can I do the most good?

That depends on what you want to accomplish. We are knowledgeable regarding local needs and agencies, and can help you craft a plan to support the causes you care about most... in Solano County and elsewhere.

How do I plan an estate gift?

Call your estate advisor, talk to us, or consult with both. We provide confidential philanthropic services to prospective donors and their professional advisors, without pressure or obligation. Giving a legacy gift is simple:

- *You include a bequest to the community foundation in your will and notify us*
- *Upon your death, we establish a fund in the name you've chosen*