



San Francisco
Foundation

Bay Area Promise Society

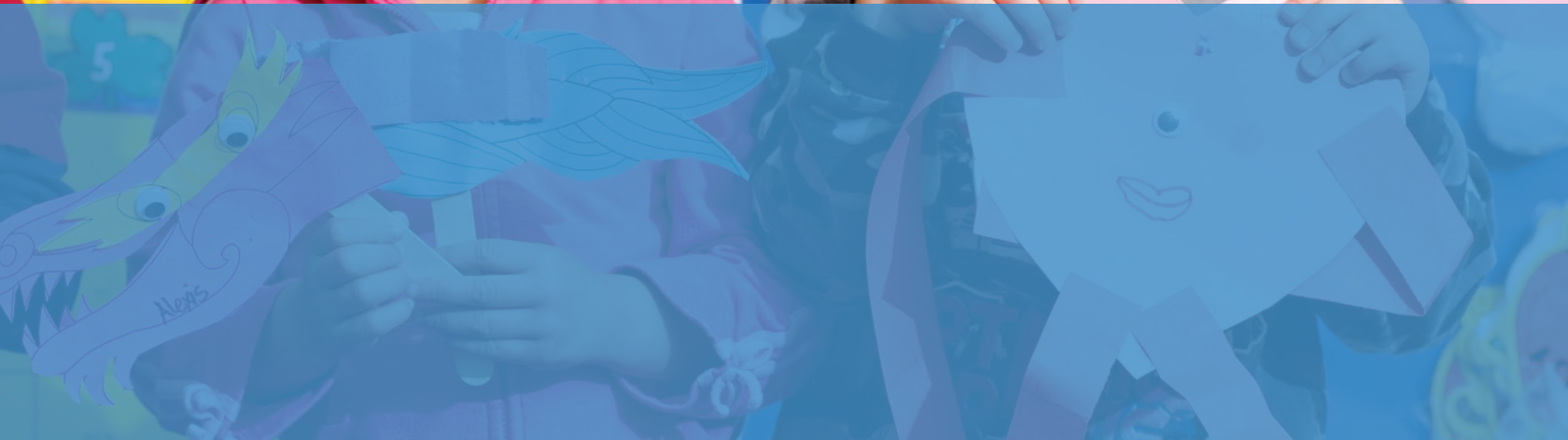




March



Wednesday
Wed.



BAY AREA PROMISE SOCIETY

Let your generosity
live on for future
generations.

YOUR TRUSTED PARTNER

Leaving a legacy

A safe place to sleep, a child health program, career-ladder job training, wetlands protection in the San Francisco Bay—these programs, and many more, were made possible by legacy donors whose generosity will live on forever in the vitality of the Bay Area.

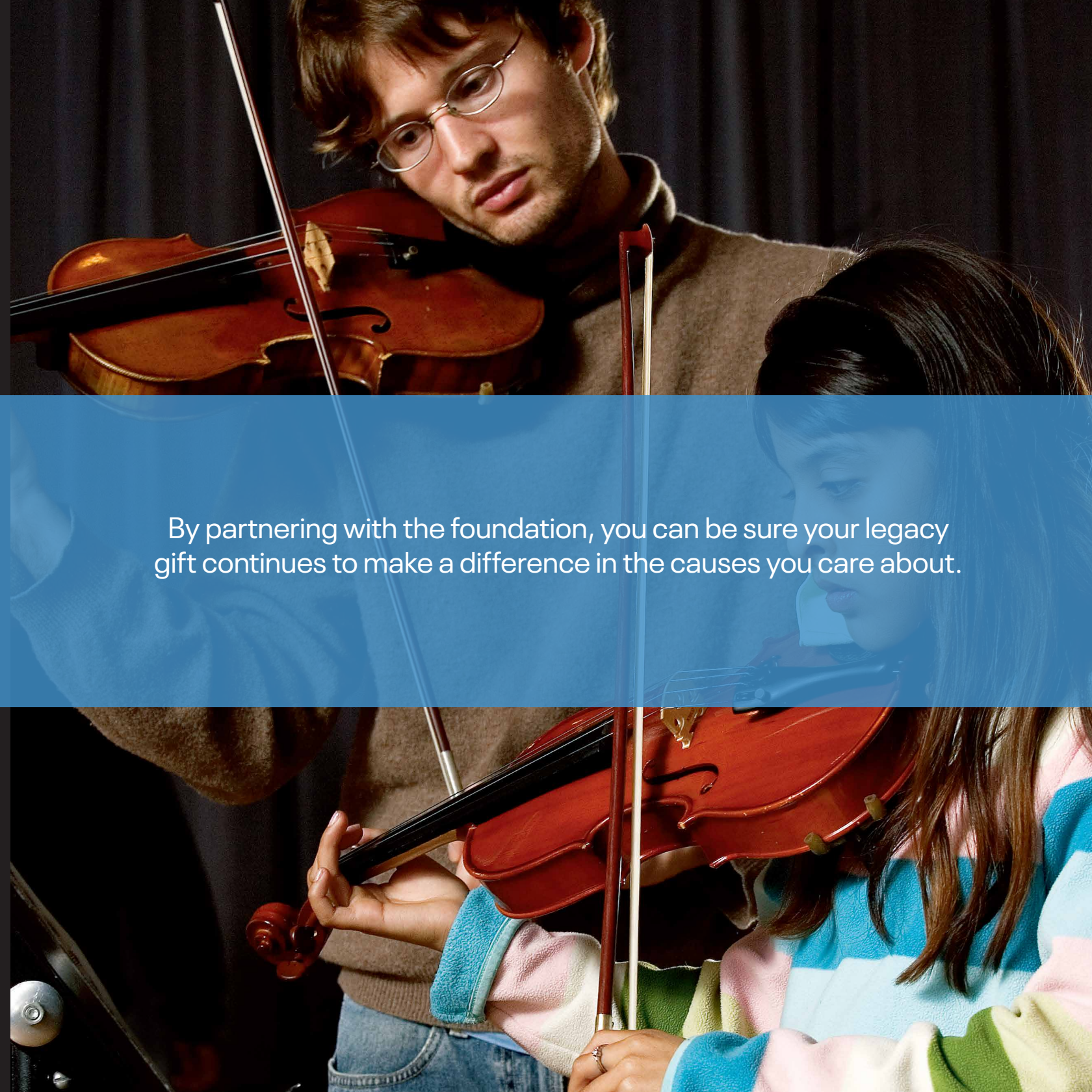
Whether you are thinking about legacy giving for the first time, or want to revisit your current plan, the San Francisco Foundation is a trusted partner to ensure your legacy carries out your vision for the future.

Partnering for the future

For decades, we have worked hand-in-hand with individual and family donors to create legacies that are a part of the solution to the evolving needs of the region.

The San Francisco Foundation has deep roots and expertise in the Bay Area. We have an intimate knowledge of the region's unique challenges, and the bold solutions to address them. Our role as a community foundation provides our family of donors access to this expertise, and a vast network of organizations and leaders making a difference.

Long term financial stewardship is an essential benefit of partnering with the foundation. Our disciplined, long-term investment strategy ensures stability for the long run that preserves and grows contributions in perpetuity. Our stewardship of assets ensures that legacy gifts at all levels continue to make a lasting impact on the people and places in our community.

A composite image featuring a man and a young girl playing violins. The top half shows a man with glasses and a brown sweater playing a violin, looking intently at the instrument. The bottom half shows a young girl with long brown hair, wearing a colorful striped sweater, also playing a violin. A semi-transparent blue banner with white text is overlaid across the middle of the image.

By partnering with the foundation, you can be sure your legacy gift continues to make a difference in the causes you care about.



As a member of the Bay Area Promise Society you can be confident that you are a part of making a difference now and in the future.

A promise to our future: Bay Area Promise Society

The promise of equity and opportunity for the Bay Area's future generations.

If you have named the San Francisco Foundation in your estate plans, we welcome you as a member of the Bay Area Promise Society.

As a member, you enjoy events and updates developed specifically for the Bay Area Promise Society. These include presentations by issue experts and leaders in the financial and philanthropic fields, site visits to nonprofit organizations, and opportunities to learn what others are doing with their legacy plans.

Additionally, members receive the benefits of all foundation donors, including tailored financial advice, and the expertise of our staff and Foundation networks. These tools strengthen your philanthropy now, and help you continue to make a difference into the future.



A few of our partners

A vision of vibrant communities

Local philanthropy and community involvement have been driving forces for Susanna MacDonald and her family for their entire lives. Susanna's mother cultivated a strong passion and calling to support arts and culture in her daughter. From this seed grew Susanna's holistic view of all the necessary elements of a thriving community. Acting upon her shared values and giving strategies with the San Francisco Foundation, Susanna has included the foundation in her estate plans. Susanna's legacy gift ensures that her vision and mission to make the Bay Area a thriving artistic and cultural community will continue in perpetuity.



Making a difference now, and in the future

Nigel and Barbara Renton supported causes close to their hearts throughout their lives. As their financial situation evolved, they wanted to make a longer term commitment to education, the arts, and the environment. In addition to opening a donor advised fund at the San Francisco Foundation, they used assets of appreciated stocks to fund a charitable remainder unitrust. The Rentons legacy gift provides a stream of income to support both their donor advised fund and their most revered causes, strengthening our community for generations to come.

We are honored to recognize those who have played a pivotal role continuing the promise of the Bay Area for future generations.



HELPING YOU PLAN FOR THE FUTURE

The San Francisco Foundation recognizes that each donor has unique philanthropic goals and objectives. Drawing on experience and creativity, we can help you design a planned giving solution that addresses your specific needs—both charitable and financial.

Learn more about how we can work with you to create a plan for your legacy by contacting our Development and Donor Services team at (415) 733-8500 or legacygiving@sff.org, or visiting sff.org/legacy.

Bequest by Will or Trust

You may name the San Francisco Foundation and leave a specific sum of money, a percentage of your estate, or what remains after other bequests have been satisfied. Whether designated or unrestricted, in your memory or in that of a loved one, the foundation can work with you to create a lasting tribute.

Retirement Plan Assets

Having assets in your IRA or other qualified retirement plans naming the San Francisco Foundation is a simple and effective way to benefit the community while avoiding significant, often unanticipated taxes. Using retirement plan assets to fulfill your charitable legacy can be far more advantageous than including assets in your taxable estate or leaving them to heirs, which may be heavily taxed.

You may designate that after your death, assets remaining in the plan are to be contributed to a fund at the foundation, and no estate tax or income tax is due on the retirement assets that pass to the foundation.



Charitable Remainder Trust

Giving through a charitable remainder trust allows you to receive income for the life of the trust, with the remainder to the foundation to distribute according to your charitable goals.

An irrevocable trust of at least \$100,000 is setup that pays either a fixed or variable income to you or your named beneficiaries for life or for a fixed term not exceeding 20 years, or a combination of the two. You receive an income tax deduction for the present value of the gift the year the trust is funded.

If selected as Trustee, the foundation invests and manages the trust, and when the trust term terminates, the foundation uses the remaining assets to establish a fund or adds them to an existing fund at the foundation.

Retained Life Estate

Your home, one of your most valued possessions, can become a meaningful gift to the San Francisco Foundation—even while you are still living in it, and even if you want your spouse or other survivor to live there for life.

In this arrangement, you enjoy the property as long as you like while giving future ownership to the foundation. You receive an income tax deduction the year the contribution is arranged through the irrevocable gift of the “remainder interest”, and proceeds from the sale go to establish or add to a fund here at the foundation.

Charitable Lead Trusts

A charitable lead trust enables you to make a significant charitable gift now while transferring substantial assets to beneficiaries later.

To use this giving option, a trust is setup that distributes annual payments to the foundation for a specific number of years. Trust distributions go first to your fund here at the foundation, and then on to charities you specify. When the trust terminates, the remaining principal is returned to you, or more typically, your children or other loved ones at reduced tax cost or tax-free.

To learn more, visit: **sff.org**