



*"To keep a lamp burning, we have to keep oil in it"*  
— Mother Teresa



## Legal Information and Bequest Language for Charitable Gifts

The following information is provided to assist you in developing your charitable gift and estate plans in consultation with your attorney, accountant, and/or other advisors.

The legal name to be used when making gifts to the endowment via wills, trusts, and other gift transfer documents is "Assistance League® of North Coast, a California nonprofit corporation, with its principal place of business at Carlsbad, California."

The following language is recommended for making a gift to the endowment: "I hereby give to Assistance League of North Coast, a California nonprofit corporation with its principal place of business at Carlsbad, California:

- The sum of \$ \_\_\_\_\_ (amount) and/or
- The following described property \_\_\_\_\_ (description) and/or
- \_\_\_\_\_ (percent) of the residue of my estate.

This gift shall be included in the Assistance League of North Coast Endowment Fund.

Confirmation of the tax-exempt status for Assistance League of North Coast is provided in the form of a letter from the Internal Revenue Service, U.S. Department of the Treasury. A copy of this document can be obtained by contacting Assistance League of North Coast, at 760-512-3338 or Pam Whitaker at 760-845-9196. The Federal Tax Identification Number for Assistance League of North Coast is 33-0530220 and the Group Exemption Number of 4146.



assistance league®  
Assistance League of North Coast  
P.O. Box 2682  
Carlsbad, CA 92018  
760-722-2286  
[www.ALNC.org](http://www.ALNC.org)



## A Legacy of Giving



Assistance League of North Coast  
Endowment Fund



## A Community of Volunteers

Assistance League® of North Coast, a chapter of National Assistance League, is dedicated to "serving the needs, primarily of children, in the communities of Carlsbad, Oceanside and Vista, with the goal of providing a positive starting point for academic success."

More than 180 members combine to create a vibrant community of volunteers. These dedicated members contribute over 20,000 "hands-on" hours of service each year to philanthropic programs that directly touch the lives of children in the tri-city area of Carlsbad, Oceanside and Vista. With no paid employees our volunteers' hours are worth \$500,000 to the community.



The chapter's **Operation School Bell®** community programs include:

- **Baby Real Deal** provides hands-on infant simulators, programmed like real babies, that can be taken home for exposure to parenting experiences. These simulators and related equipment are also utilized by local school districts to help prevent teenage pregnancy.
- **Chapters for Children** along with other local chapters, distributes school clothing and supplies to Camp Pendleton.
- **Clothing Children** provides school uniforms and school clothing for children in need.
- **Community Assistance** gives aid to children who are in dire need due to disasters or other circumstances.
- **Emergency Clothing** provides elementary school health offices with socks, underwear, sweatshirts, sweatpants, shirts, and shorts for unforeseen needs and accidents of children.
- **Footsteps** provides shoes, six pairs of socks and health kits to elementary and MAAC-Head Start children.
- **Health Kits** provides personal hygiene kits to students participating in Footsteps and those receiving emergency clothing. Kits include: toothbrush, toothpaste, dental floss, brush, comb, tissue, soap, washcloth and shampoo.
- **Home Alone** presents a personal safety program for 4th graders to teach them how to be in charge of their own safety.
- **I Love to Read** encourages children to read by providing books and t-shirts as reading incentives, and by serving as mentors to encourage academic effort.
- **New Haven Boys** provides clothing 2-3 times a year for adolescent boys attending New Haven Youth & Family Services, a residential treatment center.
- **World of Books** provides financial support for purchase of books for school libraries.
- **Wee Help** provides layettes to teen mothers who are attending school.



### • Enriching Lives •

For 26 years Assistance League® of North Coast has fulfilled its vision to "be the premier philanthropic organization in Coastal North County San Diego, connecting with children in need." For some it has been the added assurance of new school clothing, for others the strength of a mentoring relationship, and others the will to stay in school while providing for their newborn.

### • Endowing the Future •

The Assistance League of North Coast is dedicated to supporting the mission and vision of the National Assistance League. Charitable gifts to the endowment ensure the organization is financially ready to meet the needs of the community for decades to come.

### • A Legacy of Giving •

Through your gift to the endowment, you will strengthen Assistance League of North Coast and enrich the lives of future generations. Please consider making an estate provision or a planned or deferred gift to benefit the future of Assistance League of North Coast. Also, please consider notifying us of your intentions so that we might welcome you to the Legacy Society – our way of acknowledging present and future endowment gifts to Assistance League of North Coast.



## Choose the Charitable Gift That Matches Your Goals

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Defer a gift until after your lifetime	Bequest in Will	Name us in your will (designate a specific amount, a percentage, or a share of the residue)	Donation is exempt from federal estate tax; control of asset for your lifetime
Make a quick and easy gift	Outright Gift of Cash	Simply write a check	Immediate income tax deduction; removes property from estate
Avoid tax on capital gains	Outright Gift of Securities	Contribute long term appreciated stock or other eligible securities	Immediate charitable deduction of full fair market value; avoidance of capital gains tax
Avoid capital gains tax on the sale of a home or other real estate	Gift of Real Estate	Donate the property to us or sell it to us at a bargain price	Immediate fair market value income tax deduction; reduction or elimination of capital gains tax
Avoid twofold taxation on retirement plan assets	Retirement Plan Gift (IRA)	Name us as the beneficiary of the remainder of the assets after your lifetime	Make the gift from the most highly taxed assets leaving more for family; avoids income and estate tax
Make a large gift at little or no cost to yourself	Life Insurance Gift	Contribute a life insurance policy you no longer need	Current income tax deduction; possible future deductions through gifts to pay policy premiums
Give your personal residence or second home, but continue to live there	Gift of Retained Life Estate	Deed ownership of your home to us but retain occupancy	Valuable charitable income tax deduction; lifetime use of residence
Secure a higher fixed annual income	Charitable Remainder Annuity Trust	Create a charitable trust that pays you and/or another beneficiary a fixed income annually	Immediate income tax deduction; fixed payments for life, often at a higher rate of return
Supplement income with higher fixed annual income	Charitable Gift Annuity	Enter into a charitable gift annuity contract with us that pays a set amount for one or two lives	Current and future savings on income taxes; stable payments for life
Reduce gift and estate taxes on assets passing to heirs	Charitable Lead Trust	Create a charitable trust that pays fixed or variable income to us for specific term of years, principal is retained for your heirs	Reduces your taxable estate; your family keeps the property, often with reduced gift taxes
Create a hedge against inflation over the long term	Charitable Remainder Unitrust	Create a trust that pays a fixed percentage of trust's assets as revalued annually	Receive a variable income for life; immediate income tax charitable deduction