

How Do You Want to be Remembered?

It's not surprising that a national survey published in Forbes indicated the vast majority of Americans (69%)* want to be known—and remembered—for living their values and the meaningful life lessons they've shared, as opposed to what they accumulated or achieved. In effect, it's about the contribution and impact they're making today—and can continue to make beyond—for the lives of their families and communities.

What do you want to be known for? How do you want to be remembered?

Leave Your Mark

A planned gift allows you to transfer value from an asset to a worthy non-profit organization and leave an indelible mark on your community.

The Regalo Society provides an enduring pathway to stretch, grow and develop minds and talents, leading to futures that flourish.

As a founding member of the Regalo Society, your gift to the Foundation for Palm Springs Unified School District, through an estate plan or another planned-giving vehicle, is designed to elevate opportunities for the youngest members of your community.

You may designate your gift to a specific purpose or program; at the same time, given the changing dynamics we face, we often recommend unrestricted gifts. As rapidly as technology evolves, education must keep pace. An unrestricted gift has latitude to fund innovative initiatives as they emerge. The Foundation's Board of Directors determines the appropriate programs that will enhance the mission.

Tomorrow's Tomorrow

There are infinite ways to make a difference, to leave an enduring mark on your community. Yet one of the most powerful, proven ways is to begin at the beginning, with educational opportunities and innovative programs that exceed classroom basics. We need to equip and empower 20,000+ students to make our world of tomorrow and tomorrow's tomorrow better than today. Supporting an organization that has an authentic mission, one that's future-focused on building innovative and creative thinkers of tomorrow, guarantees your gift will touch lives far beyond, in ways unimaginable.

We'd be grateful for the opportunity to explore planned giving opportunities that best suit your objectives. We have an experienced giving team available to meet one-on-one at your convenience.

Please consult your personal financial advisor, accountant and attorney when making any decision on a planned gift.

The Foundation for Palm Springs Unified School District

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**Regalo**
SOCIETY

What we want to be known for and how we want to be remembered are strong reflections of what matters most to us.

*Source: How do you want to be remembered, Steve Vernon, forbes.com, February 19, 2019



There are several ways to make a planned gift to the Foundation for Palm Springs Unified School District.

While a cash gift can make an immediate impact on our programs and services today, a planned gift can make a meaningful, lasting impact for decades. What's more, many planned gifts offer immediate and long-term tax reduction advantages, and sometimes provide you with income.

A Bequest

A bequest is an efficient and easy way to create a planned gift. Quite simply, a bequest leaves a percentage of your estate or designates a specific amount to be given to the organization of your choice upon settling your estate. Using simple language, you can add a provision for a planned gift. We are happy to provide standard bequest language for you, if needed.

Gifts of Real Estate

Whether it be a personal residence, a vacation residence, developed or undeveloped property, real estate may be gifted to the Foundation. These gifts usually result in an immediate charitable income tax deduction and usually avoid capital gains tax on the sale of the property. In addition to an outright gift of real estate property, a specific percentage of the property may be gifted to the Foundation.

Gifts of Personal Property

Gifts like a painting or artworks, a collection of books or valued collectibles are all excellent items to consider gifting to the Foundation. A gift of an automobile is also a welcome addition. Gifts may be sold, with proceeds benefiting the Foundation, or used in fulfillment of our mission.

Gifts of Life Insurance

You can provide a significant future gift by giving an existing life insurance policy to the Foundation or, alternatively, by purchasing a new policy and naming the Foundation as the beneficiary. This is a simple avenue and yet greatly increases the value of your gift to the Foundation.

Gifts of Securities

At any point in your life, a gift of publicly traded or closely held securities may make financial sense. Ideal candidates for a planned gift are highly appreciated securities with the benefit of avoiding capital gains taxation. The gift also provides an immediate charitable income tax deduction to the donor. This is a savvy option to provide meaningful support to the Foundation's programs and services.

IRA Distributions

Individuals 70-½ years or older are allowed to distribute up to \$100,000 from their IRA directly to a qualified charity and pay no income tax on the distribution. This is referred to as a qualified charitable distribution and counts toward satisfying the individual's required minimum distribution (RMD). Since the funds come directly from their IRA, the donor does not receive a charitable income tax deduction.

Donor-Advised Funds

A donor-advised fund is like a charitable investment account whose sole purpose is to support charitable organizations you care about.

Contributing cash or securities to a donor-advised fund means you're often eligible to take an immediate charitable income tax deduction. Those funds may be invested for tax-free growth. Donors can then make grants from the donor-advised fund to the Foundation for Palm Springs Unified School District.

You are invited to become a Founding Member of The Regalo Society

Planned Giving for The Foundation for PSUSD

Please share your interest in becoming a founding member. Connect with Foundation Director, Ellen Goodman, express your interest to any board member of The Foundation, or email us at TheFoundation@psusd.us. We will follow up with you directly.