



Planning for the Future
Susan L. Curtis Charitable Foundation

You are passionate about and committed to Maine’s youth. Your passion and commitment will live on through a legacy gift to The Susan L. Curtis Charitable Foundation, carefully stewarded by an organization with a 40+ year history of fiscal responsibility and dedication. The information below is a starting point for conversation. *Always consult with your attorneys, accountants, and/or financial advisors before making any decisions about estate planning.*

If your goal is to	Consider a	Advantages
<p>Keep Control of your assets throughout your life.</p> <p>Include a statement in your will or living trust that a share of your estate will be distributed to the Susan L Curtis Charitable Foundation (SCF) for estate tax purposes.</p>	Bequest	<p>You can create a bequest through your will or trust stating that a specific amount or percentage of your estate or by changing the beneficiary of a life insurance policy, annuity or retirement account.*</p>
<p>Retain the right to live in your residence for life.</p> <p>Use the equity in your home to generate additional retirement income.</p>	Life Estate	<p>If your situation changes you can rent the property to others or exchange your life estate for cash or annuity.*</p>
<p>Obtain a fixed or variable lifetime income and an immediate income tax deduction.</p> <p>Bypass capital gain taxes and reduce your estate taxes.</p> <p>After the trust expires, the charitable remainder is directed to SCF.</p>	Charitable Trusts	<p>Provides income to SCF during your lifetime.*</p> <p>Distribution must be paid at least annually for life or for a term of years, with an irrevocable remainder interest to be held for the benefit of, or paid over to SCF (and additional charities as desired).*</p>
<p>Ensure that your philanthropic legacy lives indefinitely.</p>	Endowment Gift	<p>Can be funded outright or by a multi-year pledge or a designated remainder from a trust, annuity or an estate.*</p>

**To learn more about joining our Wishboat Legacy Society,
 please contact SCF Staff at: info@susancurtis.org**

Susan L. Curtis Charitable Foundation
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