

A living legacy checklist

Every day you're writing your legacy – is it one that reflects what matters most to you? Review this checklist for ideas on how to communicate your values through your actions at home, in the workplace and in the community.



YOUR COMMUNITY LEGACY

- Share your giving story.** Consider writing a letter to your favorite nonprofit to explain why you give, and spark others' generosity.
- Get hands-on experience.** From delivering meals to balancing books, you can use your skills to make an impact. Get ideas at [volunteermatch.org](https://www.volunteermatch.org).
- Donate appreciated securities.** You can maximize your gift to a great cause while creating a tax break for you.
- Think about bunching.** Talk to your professional advisors about aggregating charitable gifts in a donor advised fund to save money at tax time.
- Nurture a family of philanthropists.** Invite family members to participate in charitable giving decisions and volunteer efforts to amplify your impact.
- Give strategically in retirement.** Some IRA owners can donate required minimum distributions to charity, potentially reducing taxes.
- Find the ideal option for you.** Talk to your advisor about your options for giving, including charitable lead trusts and remainder trusts, endowments and more.

LIVE YOUR LEGACY YOUR WAY.

Get guidance that can help you create a lasting impact.