

# *Forever Home Society*

CASA's Planned Giving Program

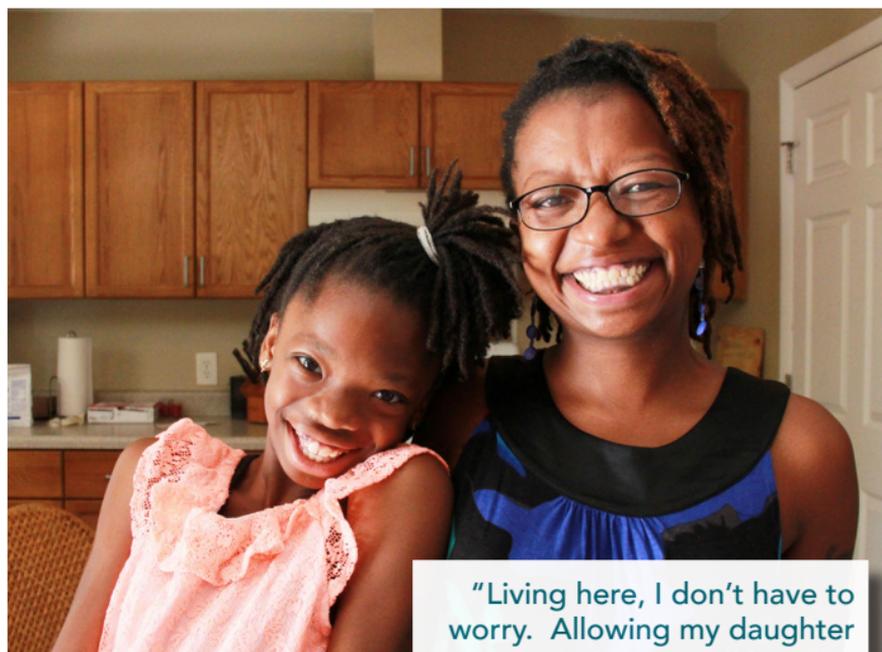


the solution to homelessness is **housing**

# Planned gifts make a lasting difference.

CASA's Forever Home Society recognizes individuals and families who remember CASA housing in their estate plans, enabling CASA to secure housing for generations to come.

CASA is tax-exempt, so your planned gift supports our housing mission at its full value. Leaving your assets to family is subject to federal income tax.



"Living here, I don't have to worry. Allowing my daughter and I a place to call home is breaking a generational curse. That is truly a blessing!"

-Sharon

## CASA's mission is to develop and manage affordable housing, providing opportunities for successful living.

CASA tenants include veterans, families with children, and people living with disabilities. Our focus is on maintaining high quality, affordable apartments for people most in need, and on growing to serve more low-wealth families and individuals, many of whom have been homeless.

You become a Forever Home Society member simply by notifying us that you have named CASA in your will or estate plan. Your support of CASA's mission can continue providing people in need with affordable housing well beyond your own lifetime.

[www.casanc.org/foreverhome](http://www.casanc.org/foreverhome)



## Planned Giving Opportunities

### Bequests

Bequest gifts are specific gift intentions stated in your will. This type of gift leaves the full use of the gift in the donor's hands during his or her lifetime.

- **General bequests** specify a designated sum to CASA.
- **Percentage bequests** gift to CASA a specific fraction of your estate.
- **Residual bequests** gift to CASA everything remaining or a percentage of an estate after all other costs and bequests have been satisfied.
- **Contingent bequests** include a condition, as in the case of spouses who stipulate that if the other is not living, a secondary beneficiary receives the assets.

### Beneficiary Designations

You can designate CASA as the primary or contingent beneficiary of a life insurance policy or retirement plan. You can review and adjust beneficiary designations at any time, making this a flexible way to plan your gift.

### Gifts of Real Estate or Property

An outright gift of real estate or personal property benefits CASA's mission right away and gives you an immediate federal income tax deduction. Donating property through your will means your estate will receive a federal estate tax charitable deduction.

### Gifts of Appreciated Securities

Many donors use stocks, bonds, or mutual funds to make gifts. If they have increased in value since you obtained them, there can be a tax advantage.

### Charitable Remainder Trusts

Establishing a tax-exempt charitable remainder trust allows you to make a tax-free donation of assets, such as stock, while you receive a lifetime annuity and a charitable deduction upon creation of the trust.



“Supporting CASA’s affordable housing mission is an important part of my life. By including CASA in my estate planning, I know that I can continue to impact my community in a meaningful way well into the future.”

-Nancye Bryan  
Forever Home Society



Considering a gift to support CASA now or in the future?

Contact: Missy Hatley  
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This information is not intended as legal or tax advice.  
For such advice, please consult an attorney or tax advisor.