

Planned Giving

Dramatic increases in life expectancy make long-range retirement planning essential. Likewise, long-range planning is essential for public television so that we may assure our Northwest Florida and South Alabama community of viewers of our commitment to provide quality programming.

Do you have concerns about your long-term financial security?

Good news! Careful financial planning can both secure your financial future and enable you to make generous gifts toward your favorite non-profit organizations



Planned Giving Quick Facts

- Review your financial and estate plans. Update your will or write a new one. Without a will, someone else will make decisions about distributing your assets and belongings. If you die without a will, the government may become your charity of choice.
- Identify the charities you currently support or those to whom you would like to say “thank you” or “keep up the good work.”
- Leave a bequest for the charities that make a difference in your life. You may leave a specific amount of money or a percentage of your assets to charity or name a charitable organization as the beneficiary of your pension, annuity, IRA or life insurance policy. You may make a bequest from a diverse assortment of assets, including collectibles and mutual funds and equities, etc.
- Ask your financial advisors for information on the tax and legal advantage of making charitable estate gifts. Professional guidance will ensure your estate plan meets your goals, helps your special charities and provides for your beneficiaries.
- Encourage your family and friends to include charitable gifts in their wills by telling them that you have done it.

WSRE-TV is a member of Leave a Legacy, a nationwide campaign to inform individuals and families about planned giving and to encourage the inclusion of charitable gifts in estate planning. WSRE-TV encourages you to consult with an estate-planning professional about available options.

WSRE-TV

Reflecting on Tomorrow, Helping Others Today

Retirement Planning and Charitable Giving Can Go Hand-in-Hand

We all have to manage our resources wisely. It is important that you provide for yourself and your family first. Once this is accomplished, you may wish to consider establishing charitable giving goals. You can use a variety of assets - mutual funds and stocks, real estate, an art collection, antiques or stamps - and retain control over these assets during your lifetime.

By creating an ongoing charitable gift fund, you create a lifetime income for yourself and your family, support the contributions of public television to our community, enjoy immediate and future tax benefits and enhance the value of your estate.

Perhaps you and your family are concerned about the potential for estate depletion by establishing a charitable gift fund. You will be comforted to know that the tax savings and income realized through a charitable gift fund may be sufficient to purchase life insurance, the proceeds of which may be used to replace assets you've given away as charitable gifts.

Ways to Make Your Mark

A number of helpful tools have been developed that are designed to help you make significant charitable gifts while also enjoying a number of tax and other financial benefits.

- Bequests by Will — are a means of making long-range gifts, and may be in the form of a dollar amount, property, a percentage or the residual of an estate.
- Charitable Remainder Trusts — are assets that are placed in a trust and the earnings are paid as income to you and your beneficiaries. Upon the death of the last beneficiary, the principal goes to your designated charity.
- Charitable Lead Trusts — are assets placed in a trust for a specified period of time. Earnings go to your favorite charity during the life of the trust, and the principal goes to your beneficiaries when the trust terminates.
- Real Estate Gifts — can have special benefits for the donor and the recipient. Whether property value has increased or decreased in value, it can be a practical and beneficial gift.
- Securities — allow taxpayers to enjoy the opportunity to make charitable gifts of stocks, bonds, mutual funds and other securities that have increased in value while bypassing capital gains taxes that would be due on the sale.
- Life Insurance — is a flexible-planning tool that can be used to meet a variety of personal financial needs.
- Memorial & Appreciation Gifts — are gifts to your favorite charity in honor of loved ones and can be created immediately and added to periodically.

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For the Future

It is our hope that some of the ideas presented in our Web site will capture your interest and encourage you to pursue long-range financial planning favorable to yourself and to your charitable giving goals. It is eminently practical for friends of public television to continue giving while enjoying solid financial security during retirement years. It is possible and relatively easy to balance personal financial goals with your desire to give.

Contact Us

If you would like to talk with us, or receive more information, call or e-mail:

Jean Norman, WSRE-TV's Director of Development and Marketing, at (850) 484-1246; fax (850) 484-1255; or via e-mail jean_norman@wsre.pbs.org

Special thanks to WSRE-TV's Planned Giving Advisory Council:

Roger Goldberg, Chair
Frederick Jackson
Patricia Kerrigan

Brett Lomax
George Loomis
Rodger Lowery

Patricia Miller
John Piwowarczyk
Michael Thornton

Phil Velez
Pat Windham-Harvey