

Planned Giving to the
US Submarine Veterans Charitable Foundation
(aka SubVets Charitable Foundation)

Examples of a Planned Gift could be:

WILL OR CODICIL BEQUEST: A bequest in your will can be used to leave any of the above outright gifts to the Subvet Charitable Foundation or to establish a planned contribution.

CHARITABLE GIFT ANNUITY: It is possible to make a donation of cash or securities to establish a Charitable Gift Annuity to provide you or another individual with guaranteed, partially tax-free income for life.

CHARITABLE REMAINDER TRUST: A Charitable Remainder Trust provides an individual with income for either life or a term up to 20 years from the date the gift is made. When the trust terminates, the Subvet Charitable Foundation receives the trust's principal.

CHARITABLE LEAD TRUST: A Charitable Lead Trust provides the Subvet Charitable Foundation with a steady income for a term of years or the life of an individual. When the trust terminates, the donor's designated heirs will receive the trust's appreciated principal.

LIFE INSURANCE: There are several ways to use life insurance to make a donation to the Subvet Charitable Foundation. The Subvet Charitable Foundation can be named as owner and beneficiary to an existing policy or a new policy can be established.

RETIREMENT ASSETS: The combination of federal income, estate and excise taxes can seriously erode the value of retirement savings. Naming the Subvet Charitable Foundation as a beneficiary of these assets can save your estate and heirs both income tax and federal estate taxes.

SubVets Legacy Society: The Subvet Charitable Foundation honors and recognizes the generosity and vision of those who have chosen to leave a legacy through estate or deferred gifts to the Subvet Charitable Foundation. Legacy donors receive special recognition in USSVI publications.

The Subvet Charitable Foundation will also honor requests for donor anonymity.

Enrollment in the SubVets Legacy Society is simply a matter of advising the Subvet Charitable Foundation of the creation of a legacy gift: a bequest in a will or living trust; a charitable gift annuity; a charitable remainder trust; a Subvet Charitable Foundation pooled income gift; or designation as beneficiary of a retirement plan or life insurance policy.

For more information on supporting the Subvet Charitable Foundation (USSVCF), please contact the Office at (877) 542-3870 phone or send an email to office@ussvi.org.