

Estate GIFT FAQ's

"I'm not a wealthy person so how can I afford to leave Marin Community Clinics a planned gift?"

The fact is nearly half of the legacy gifts left to charities in this country are less than \$25,000. Many of us underestimate the full, potential value of our estate once all of our assets are accounted for. Large numbers of five figure legacy gifts add up, and when invested as part of a much larger Endowment Fund or Board Reserve Fund, will compound substantially over time.

Do not let a dollar sign define your legacy. The awareness that someone has simply made a legacy commitment can inspire others to do so.

"We've always supported Marin Community Clinics' Maternal and Children's program. Can we specify that our planned gift be used for these services?"

Pending Board acceptance, every planned gift will be used as the donor directs. Some programs that are offered today may, with the passage of time, be altered or even replaced, so the MCC Board maintains final discretion in the acceptance and designation of gifts.

"Can I leave an inheritance to my kids and still benefit Marin Community Clinics?"

Of course, there are many ways this can be arranged through your will but one of the most common is to designate Marin Community Clinics as the residual beneficiary of your estate.

After your wishes for your kids, grandkids and any other recipients are fulfilled, and any creditors are paid, the balance of your estate will pass to the Clinics.

"How do I know Marin Community Clinics will still be in business whenever the time comes to settle my estate?"

The Clinics have treated Marin patients for over 40 years. Currently, they serve over 35,000 patients each year and MCC is the third largest healthcare provider in Marin County.

Marin Community Clinics maintain a balanced budget, and have experienced large patient growth over the past two years under the Affordable Care Act. There is every indication that the Clinics can expect a long and successful role in sustaining the health of our neighbors.

"Can I make a commitment in my estate to benefit Marin Community Clinics which will be paid during my lifetime?"

Yes, a gift to be paid out to the Clinics during ones' lifetime can be created but unlike annual gifts which are usually spent during the year in which they're received, proceeds from this form of **life estate** gift would be deposited either in the agency's Endowment Fund or Board-Designated Reserve, to be used for the Clinics' future needs.

I have some stocks that I want to give to Marin Community Clinics, how do I arrange for a gift of my stock?

It is important that you contact us so that we can assist you with transfer instructions. If you own securities in a brokerage account, we can help you set up an electronic transfer of the shares to our brokerage account. If you possess actual stock certificates, we can provide you with instructions for transfer.

Will my planned gift to Marin Community Clinics publicly recognized?

Public recognition is currently given for **all** donors who have passed away and for our living donors who have left a bequest to MCC. With that said, we are happy to reflect the donor's wish for either recognition or anonymity.

"How can I be sure that my gift will benefit Marin Community Clinics' patients long after I have passed on?"

Unless otherwise stipulated, planned gifts are deposited in the Clinics' Board Designated Reserve Fund which is invested for long term growth and may be used only as defined by Board policy. Or, donors may direct their gift to be placed in the Marin Community Clinics Endowment Fund, held and invested by Marin Community Foundation. The principal in the Endowment is maintained for perpetuity and only the income may be spent by the Clinics.

My question wasn't addressed, how can I get more information about planned giving?

For more information about planned giving, or any other form of giving, please contact our development team by phone at, 415-526-8527 or by email at gifts@marinclinics.org. We look forward to answering any questions you may have.