

Legacy Circle Membership Form

Please enroll me/us in the **Legacy Circle**

Name(s) _____

Address _____

City _____ State _____ Zip _____

Email _____

Phone _____

I/we prefer to remain anonymous

I/we have included Marin Community Clinics in my/our estate plan.
My/our gift is in the form of:

- Will/Bequest/Estate Plan
- IRA/Pension Plan
- Life Insurance Policy
- Living Trust
- Other type of Trust
- Other (please describe): _____

Description/Amount of gift (optional): _____

You may contact my/our attorney/financial advisor regarding this gift

Advisor Name (First,Last) _____ Phone/Email _____

Please return this completed form to:

Development Office
Marin Community Clinics
9 Commercial Blvd. Suite 100
Novato, CA 94949



MARIN COMMUNITY CLINICS

In the ever-changing landscape of healthcare, there will always be a need for Marin Community Clinics. For over four decades, we have built a reputation for providing high quality, compassionate health care to patients of all ages from all backgrounds. Serving as the linchpin of Marin's safety net, Marin Community Clinics is positioned to lead a healthy community for years to come.

At the core of our financial base are committed, charitable investors whose gifts allow us to remain a beacon of hope for our neighbors in need.

SUSTAINING THE MISSION

Planned gifts transcend generations and we are deeply moved every time someone makes a future commitment. With that said, planned giving involves sensitive topics, which is why we have provided answers to some common questions that arise when considering planned giving.

There are many ways to make planned gifts, ranging from writing a check to setting up a special trust. The best choice depends on your goals. The Legacy Circle recognizes and honors the visionary individuals, couples and families who have included a future gift to Marin Community Clinics in their estate plans.

*"Choosing to become a member of the **Legacy Circle** was such an easy decision for me. I believe greatly in the Mission Statement of MCC and I support the future of this wonderful clinic. My commitment is made with a **happy heart!**"*

-Becky Oken

CREATING A LASTING LEGACY

Remembering Marin Community Clinics with a Legacy gift will sustain and strengthen the Clinics in years to come. There are many ways to leave a Legacy gift but most fall under two general categories; Bequests or Estate Plan Gifts and Life Income Gifts.

BEQUESTS AND ESTATE PLAN GIFTS

A bequest is a gift from your estate—a transfer of cash, securities, or other property, made through your estate plans. You can make a bequest to Marin Community Clinics by including language in your will or living trust leaving a portion of your estate to Marin Community Clinics, or by designating Marin Community Clinics as a beneficiary of your retirement account or life insurance policy.

Some of the advantages of creating a bequest include:

- A bequest costs nothing now, yet gives you the satisfaction of knowing you have provided for Marin Community Clinics in the future
- You retain control of and use of your assets during your lifetime
- You may modify your bequest if your circumstances change
- Gifts to Marin Community Clinics from your estate are exempt from federal estate taxes
- If you let Marin Community Clinics know of your plans, we will be able to thank you now and recognize you as a member of our Legacy Circle



CONTACT US

The Development Office is happy to help you explore options for designating a bequest to Marin Community Clinics.

Those considering a planned gift should consult their own legal and tax advisors. The staff in the Development Office is happy to speak with advisors as well.

LIFE INCOME GIFTS

A life income gift allows you to give assets to Marin Community Clinics while providing yourself or others with income for a period of time.

There are several kinds of life income gifts including:

CHARITABLE REMAINDER UNITRUSTS & ANNUITY TRUSTS

You establish a trust from which you and/or beneficiaries receive payments for life and/or a term of years. At the end of the term, the remainder of the trust assets go to Marin Community Clinics.

POOLED INCOME FUNDS

Your gift goes into an investment pool that functions like a mutual fund. Investment returns are paid to you and/or other beneficiaries for life, after which your gift is withdrawn and used to support Marin Community Clinics.

CHARITABLE LEAD TRUSTS

A charitable lead trust makes an annual payment to Marin Community Clinics for a period of years, and at the end of the term, the remaining assets go to your children or other beneficiary.

DONOR ADVISED FUNDS

A donor advised fund allows you to make a tax-deductible gift to an eligible charitable sponsoring organization to establish a fund, and then advise them on how you would like the gift used.

LET US THANK YOU

If you have included Marin Community Clinics in your estate plans, please let us know. We would like to acknowledge your generosity, make sure the purpose of your gift is understood, and recognize you as a member of the Legacy Circle.

NAME AND I.D. NUMBER

Our official name: Marin Community Clinics
Federal tax I.D. number is 94-2237120