

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

**A.** Nearly half of the legacy gifts left to charities in the U.S. 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 legacy gifts add up, and when invested as part of a 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 made a legacy commitment can inspire others to do so.

**Q.** We've always supported Marin Community Clinics' pediatric program. Can we specify that our planned gift be used for these services?

**A.** 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 Board of Directors maintains final discretion in the designation of gifts.

**Q.** Can I leave an inheritance to my kids and still benefit Marin Community Clinics?

**A.** Of course. There are many ways this can be arranged. 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.

**Q.** How do I know Marin Community Clinics will still be in business when the time comes to settle my estate?

**A.** The Clinics have treated Marin patients for over 45 years. Currently, over 31,000 patients are served each year and we are the third largest healthcare provider in Marin County.

Marin Community Clinics maintains a balanced budget, and a Board-Designated Reserve Fund. There is every indication that the Clinics can expect a long and successful role in sustaining the health of our neighbors.

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

**A.** Yes, a gift to be paid out to the Clinics during one's lifetime can be created. 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 future needs.

**Q.**

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

**A.** 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 instructions for transfer.

**Q.**

What are some examples of language to include Marin Community Clinics in my Estate Bequest?

**A.** Sample Bequest Language are generally either for a specific sum or for the residue, or a percentage of the residue, of the estate. The following are two examples.

- Residuary or Percentage Bequest: "I give, devise and bequeath to Marin Community Clinics, a non-profit corporation of the State of California, located at \_\_\_\_\_, 1) all the residue of my estate." 2) \_\_\_\_\_ % of the residue of my estate."
- Specific Amount Bequest: "I give, devise and bequeath to Marin Community Clinics, a non-profit corporation of the State of California, located at \_\_\_\_\_, the sum of \$\_\_\_\_\_."

**Q.**

Will my planned gift to Marin Community Clinics be publicly recognized?

**A.** Public recognition is given to all donors who have made a planned gift to Marin Community Clinics. We are happy to reflect the donor's wish for either recognition or anonymity.

**Q.**

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

**A.** Unless otherwise stipulated, planned gifts are deposited in our Board-Designated Reserve Fund which is invested for long term growth and may be used only as defined by Board policy. Fund distributions will be targeted based on the evolving needs of our patients.

**Q.**

My question wasn't addressed.  
How can I get more information about planned giving?

**A.** For more information about planned giving, or any other form of giving, please contact our development team by:

Phone at 415-526-8527

Email at [gifts@marinclinics.org](mailto:gifts@marinclinics.org)

Mail at Marin Community Clinics  
c/o Development Department  
PO Box 5008  
Novato, CA 94948

We look forward to answering any questions you may have.