

Frequently Asked Questions

Q: What is planned giving?

A: Planning a gift to the Community Service Society of New York (CSS) is simply arranging now in your will, living trust, retirement account, or life insurance policy, for a future gift to the organization.

Q: What if I don't have a will?

A: Unfortunately, if someone dies without a will, in many cases state laws take over and distribute your estate according to their formulas – regardless of what you might have wanted. You may not, for example, be able to provide extra help to particular family members who may need it, or benefit friends who have been close to you. And, you might not be able to help the Community Service Society of New York or any charity that meant a lot to you during your lifetime.

Q: Do I need to have a certain amount of assets to leave a legacy gift?

A: Anyone can leave a legacy gift. There is no minimum amount.

Q: Can I make my legacy gift in honor or in memory of someone?

A: Of course. And, we will honor their memory in the special Legacy Circle section of our annual report.



The Community Service Society of New York

Five Reasons to Make a Legacy Circle Planned Gift to the Community Service Society of New York.*

- ✓ You will enjoy the satisfaction that comes with backing the present and future work of the Community Service Society of New York.
- ✓ You will find peace of mind knowing that you're leaving behind a legacy of philanthropic support to countless hardworking New Yorkers.
- ✓ You may be able to protect your property from probate, the expensive legal process that might otherwise take place after your death.
- ✓ You may have the option to make a legacy gift that can pay you a guaranteed fixed payment for life.
- ✓ You could see substantial tax advantages throughout your lifetime.

*CSS does not provide legal or financial advice. Please consult an estate planning attorney, accountant or financial advisor to review the right instruments for your unique charitable giving plans.

Powering a more equitable New York

The Community Service Society of New York (CSS) has worked with and for New Yorkers for over 175 years to promote economic opportunity and champion an equitable city and state. We power change through a strategic combination of research, services, and advocacy to make New York more livable for people facing economic insecurity.

633 Third Avenue, 10th Floor | New York, NY 10017
212-614-5301 | www.cssny.org



Planning for Your Future...and the Future of New York.

CSS
Community
Service Society

**Join our
Legacy Circle
today.**

Letter from the President & CEO

We all need to plan for the future. You plan for yours, and the Community Service Society of New York (CSS) plans on the behalf of millions of hardworking New Yorkers who are striving for equity and dignity. As we work together for a strong future for New York, I am sharing this brochure about planned giving so you can see the benefits of this type of gift, and how easy it would be for you to leave a bequest to CSS in your will.

I assure you, the impact of your planned gift will be profound. You will help ensure that we will always be there to help all New Yorkers, whether it's an ill child or a family about to lose their home.

I urge you to read these informative pages and consider the benefits of a planned gift to CSS. But first, let me quickly share some key benefits of planned giving:

- ➔ **A planned gift is possible for supporters at all income levels.** Both large and modest bequests are key to our long-term strategy of building a more equitable New York.
- ➔ **Making a planned gift need not be complex or difficult.** It's as simple as naming the Community Service Society of New York in your will.
- ➔ **Planned giving may have significant immediate and long-term tax-benefits.** Please ask your financial adviser or accountant for more details on tax benefits applicable to you.

There are many simple options to leaving a planned gift. Remember, planned giving matters today and in the future. Together, we can help the city we love.

Sincerely,



David R. Jones, Esq.
President and Chief Executive Officer

P.S. If you wish to discuss the possibility of a planned gift to the Community Service Society of New York, please contact **Karen Flayhart, Director of Philanthropic Partnerships** at kflayhart@cssny.org.

"Making a planned gift to the Community Service Society is simple and we feel much pride in doing so. Our gift will guarantee the work of CSS continues well into the future, bringing economic opportunity and justice for all in the city we love."

— Deborah Sale & Ted Striggles,
Legacy Circle Founding Members



Name the Community Service Society of New York in your will — it's simple!

Be sure to specifically name "**The Community Service Society of New York**" and include this information:

our address at

**633 Third Avenue, 10th Floor,
New York, NY 10017**

and our tax ID number

13-5562202.



**Powering a
more equitable
New York**

Planned Giving – Simple Options

After you have taken care of your loved ones, you can make a planned gift to **the Community Service Society of New York** by choosing from a number of simple options including the following:

- ➔ **BEQUEST:** You can make a bequest by naming the Community Service Society of New York in your will.
- ➔ **DONOR-ADVISED FUND (DAF):** You can also choose to have any remaining DAF funds distributed after your lifetime by naming the Community Service Society of New York as a beneficiary of all or a portion of the remaining funds.
- ➔ **STOCK OR SECURITIES:** You can specify in your will the securities you wish to leave to the Community Service Society of New York. Under certain conditions, you may be able to earn tax advantages.
- ➔ **ANNUITY:** You can invest in a charitable gift annuity to benefit the Community Service Society of New York and receive a fixed payment for life.
- ➔ **LIFE INSURANCE:** You can name the Community Service Society of New York as one of the beneficiaries of your life insurance policy.
- ➔ **RETIREMENT ACCOUNT:** You can include the Community Service Society of New York as one of the beneficiaries of your retirement accounts.

