



Planning and Estate Giving

define your legacy - Planned gifts provide the resources that create new opportunities and preserve Habitat for Humanity of Boone County's future. These gifts can qualify for significant tax deductions and include bequests, charitable gift annuities and charitable remainder trusts. Naming Habitat for Humanity of Boone County as a beneficiary in an IRA, life insurance policy, other financial account or in your will is one critical way that you can help provide for future stability and growth.

If you have already included Habitat for Humanity of Boone County in your plans, please let us know so we can thank you!

bequest provision - A provision in a will may be made using the following language:

I give, devise, and bequeath to Habitat for Humanity of Boone County, Indiana, a non-profit corporation located at 10650 Andrade Drive, Zionsville, IN 46077, _____ percent of my estate (or the sum of \$_____); or _____ percent of the residue of my estate) as an unrestricted gift.

stock and bonds gift - A charitable gift made through our Fidelity Investments account of stock or bonds can help make the dream of homeownership a reality for deserving family while also providing tax savings for you. A gift of stock owned for more than one year entitles you to a charitable deduction for the full market value at the time the gift is made. If the stock has appreciated, you also avoid a capital gains tax on the appreciation. In addition to helping Habitat for Humanity of Boone County fulfill its mission of eliminating substandard housing, you may diversify away from low-basis, long-term holdings into other assets that will better suit your needs.

If you would like to discuss any of the above options, please contact Liz Qua at lqua@boonehabitat.org.