

The Spring of Tampa Bay's

GUIDE TO MAKING A LEGACY GIFT

HELP US CHANGE THE FUTURE



THE SPRING
OF TAMPA BAY



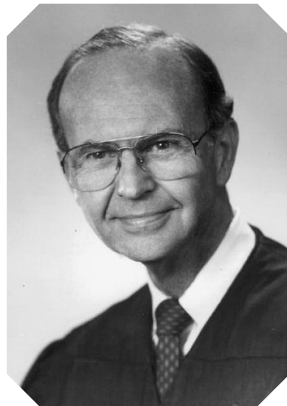
THE SPRING
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Legacy donors choose to donate for many reasons: some have supported The Spring of Tampa Bay throughout their lifetime and want to continue that support, while others may wish to memorialize a friend or loved one in a way that will last. Whatever your reason, you may be assured that your legacy gift will make our community a better place **into the future.**

Domestic violence one of the leading causes of injury to women in this country. One in four women will experience violence during her lifetime, and three women per day will die at the hands of their husbands or significant others. The Spring of Tampa Bay provides a safe haven for families utilizing an empowerment-based approach. We give survivors shelter, time to heal, encouragement, and support to move toward a self-determined life. We work to respond to the immediate safety needs of victims and their children with emergency shelter options, a 24/7 crisis hotline, and attorneys on staff who provide free legal representation for Injunctions for Protection. We also work to stabilize survivors with outreach services, support groups, and longer-stay programs.

We can't do this work without our community's ongoing support. Please consider leaving The Spring of Tampa Bay a legacy gift so that we may continue our work to provide life-saving services for victims of domestic violence and their children.



"THE SPRING OF TAMPA BAY WAS NEAR AND DEAR TO OUR FATHER'S HEART, AND HE SERVED FOR MANY YEARS ON THE BOARD OF DIRECTORS. WHEN HE WAS PLANNING FOR HIS PASSING, IT WAS VERY IMPORTANT TO HIM THAT HE MAKE A PROVISION FOR THE SPRING IN HIS ESTATE PLAN."

When you make a legacy gift of \$5,000 or more to The Spring, you become part of a special family. Membership in the Judge Don Castor Legacy Society is a wonderful testament to your desire to ensure the life-saving services of The Spring are available to survivors and their children as long as there continues to be needed in our community.

OUR PLEDGE TO YOU

- To acknowledge all legacy gifts made to The Spring.
- To document and recognize future donations.
- To use all legacy gifts for the purposes for which they were given.
- To keep the details of the gift confidential, unless you give us permission to recognize you.
- To provide accurate information on the use of Legacy Society contributions.

CONTACT US:

(813) 247-5433
THESPRING.ORG
INFO@THESPRING.ORG
P.O. BOX 5147, TAMPA, FL 33675





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LEGACY GIFTS

Your planned gift will keep on giving for generations to come. It's easier than you think.

Bequests:

Designate us as a beneficiary of your will or trust. Even 1% of your estate will help us change lives forever.

Wording for Wills

I bequeath to The Spring of Tampa Bay, Inc., a nonprofit corporation in Hillsborough County, Florida whose business address is P.O. Box 5147, Tampa FL 33675, (_____dollars) (or a particular asset) (or _____ percent of the remainder or residue of my estate) for (its areas of greatest need) (or for a specific program or service).

Codicils and Amendments

If you do not want to rewrite your estate documents, you can still remember The Spring by using a codicil to your will or an amendment to your trust. Usually, the cost of doing this is significantly lower than writing a new will or trust.

Retirement Plan:

Consider naming us as a beneficiary of your retirement plan.

Life Insurance Policy:

Naming The Spring of Tampa Bay on your life insurance policy is a simple way to provide for The Spring's future without writing or re-writing your will.

Real Estate:

You may donate a home, a vacation home, a condominium, a lot, farmland, or a commercial building. You will receive an income tax deduction based on its current fair market value. You will also avoid any capital gains tax, no matter what you paid for it. You may also avoid holding costs, such as insurance, maintenance, and property taxes.

Securities:

You can donate shares of stock, bonds, and mutual funds directly to The Spring of Tampa Bay. If the securities you own have appreciated in value, you will have to pay capital gains tax when you sell them. However, if you donate them, you completely avoid the capital gains tax, yet you can still claim a charitable deduction for the full market value.

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The IRS designates The Spring of Tampa Bay as a 501 (c)(3) organization; and The Spring's Federal Tax ID Number is 59-1777135.





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FREQUENTLY ASKED QUESTIONS

1. What is an estate?

Your estate is the sum of your assets, including property you own, insurance policies, retirement accounts, and cash on hand. No matter what your income level, you can benefit from an estate plan, as it legally protects and distributes your property based on your wishes and the needs of your family and other survivors, with as little taxation as possible.

2. Isn't a bequest something I should consider doing later in life?

Although many people begin to consider their wills as they near retirement, it is never too early to establish a will to ensure our assets are distributed according to our wishes.

3. What if my circumstances change?

Your bequest can be revoked at any time if your circumstances change. We ask that you simply keep us informed of any changes specifically related to your bequest to The Spring.

4. How does The Spring of Tampa Bay use bequests?

The Spring follows the wishes of the donor who made the bequest. We have several programs to which you might designate your bequest and would be happy to discuss them with you.

5. What kind of bequest can I make?

Bequests can be “restricted,” meaning the donor specifies that the gift be used for a specific program or purpose. Bequests also can be designated for current use, which makes the entire gift available for use immediately. An “unrestricted” gift allows The Spring to support areas of greatest need.

6. I would like to give to an endowment. Does The Spring offer this option?

An endowment is a fund that is set up to provide support in perpetuity, which means the money is never depleted as it is the interest from the fund that is used annually, while the principal remains intact. This is different from a restricted gift (see above), which is a one-time gift with no expectation that the funds will be invested from year to year. The Spring has several endowment funds held by the Community Foundation of Tampa Bay on our behalf. If you are interested in contributing to one of these funds, we will put you in contact with the appropriate person at the Foundation.

7. Are there any tax benefits from making a bequest to The Spring of Tampa Bay?

Unlike charitable gifts made during your lifetime, you do not receive a charitable income tax deduction when you make a bequest. However, if your estate is subject to estate tax, a bequest to The Spring entitles your estate to an estate tax charitable deduction for the amount donated and reduces the amount of tax your estate must pay. Also, if you make a gift by naming The Spring a beneficiary of your retirement plan or IRA, there are income tax benefits. All donors are encouraged to seek independent financial and legal counsel when executing wills, trusts, contracts, and other agreements. The Spring of Tampa Bay will provide information and assistance to donors; however, the ultimate responsibility regarding evaluations, tax-deductibility, and similar local, state, and federal compliance issues rests with the donor and such counsel as the donor may wish to secure. Please share the information contained within this document with your professional advisor(s) and with your family.



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JUDGE DON CASTOR LEGACY SOCIETY

Declaration of Intent

HELP US CHANGE THE FUTURE

As an expression of my desire to provide safety, hope and renewal to survivors of domestic violence and their children in Hillsborough County, Florida, it is my intent to name The Spring of Tampa Bay as a beneficiary.

My gift is currently valued at:

\$ _____
 a percentage of my estate's value (____%)
 a part or all of the remainder of my estate (____%)

I have included a gift to The Spring of Tampa Bay (Tax ID 59-1777135) through:

Bequest Retirement Plan Life Insurance Policy
 Real Estate Securities Other [specify] _____

I would like my gift to be:

Unrestricted
 Restricted to: _____

I would like my bequest to be named in honor of _____.

If I make any change to this provision or if the value of the bequest or gift changes substantially, I will notify The Spring of such change. I understand all information listed below will be kept in confidence unless I authorize its release.

Name(s): _____

Email: _____ Phone: _____

Address: _____

Signature: _____ Date: _____

As an expression of my desire to provide safety, hope and renewal to survivors of

I wish to be recognized as a member of The Spring's Judge Don Castor Legacy Society to help encourage others to make a similar commitment through their estates.

Please recognize me on donor lists as follows: _____

I prefer that my support remain anonymous.