

Future Legacy Fund

A flexible planning tool for giving

If you know you'd like to give in the future but you're just not ready yet, a Future Legacy Fund is your ideal planning tool. Work with our charitable giving experts to customize a structure that works for you. If your plans change, we can help you to easily update your plan to fit. It's planning with peace of mind.



Future Legacy Fund in a Snapshot



- Simple Set-Up Process
- On-Paper Only; no Fund set up yet
- Expert Charitable Giving Advice
- Access to Community Insights
- Customize the Fund's direction

We Make it Simple + You Create a Legacy



Meet with our charitable experts to create a plan for your future giving.

PLAN



UPDATE

Have a change in focus or charitable goals? Work with us to update your plan.



GIVE

When you're ready to move forward with your giving, you already have your game plan ready.

Why consider a Future Legacy Fund?

Whether you plan to give in a few years or at end of life, having a plan in place creates instant peace of mind not only for you but for your loved ones, as well. Establishing a Future Legacy Fund doesn't require an immediate gift, yet you gain access to our team of charitable giving experts that can help you compare options and find a structure that works for you. Our team also believes in collaboration and can work alongside any advisors you may have to ensure alignment with your other priorities and goals.