

---

## Benefits of Membership

- 🍷 *Invitation to the annual Community Leaders Luncheon, annual Awards Dinner and Scholars Circle events*
- 🍷 *A Certificate of Appreciation*
- 🍷 *Recognition in the Scholarship Foundation of Santa Barbara's honor roll of donors in the Report to the Community (you may elect to remain anonymous)*
- 🍷 *Your name featured on the Scholars Circle Wall of Honor*
- 🍷 *The personal satisfaction of knowing that your gift will help motivated and deserving students attend college*

I/we will support future generations of students by joining the Scholars Circle.

OR

Please contact me to discuss including the Scholarship Foundation in my estate planning.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Tel \_\_\_\_\_ Email \_\_\_\_\_

Attorney/Advisor Name \_\_\_\_\_

Trustee/Executor's Name \_\_\_\_\_

To make sure your wishes are honored, please provide details of your planned gift for our confidential records or enclose a copy of the relevant pages of your planned gift document(s).

### My recognition preferences:

Please list my/our name on all public recognition as follows:

\_\_\_\_\_

I would like to remain anonymous.

**Scholarship Foundation of Santa Barbara**  
**DEFERRED (PLANNED) GIFTS**

---

**BEQUEST**

A bequest to the Scholarship Foundation of Santa Barbara is as simple as adding a codicil to your will. This is the most common planned gift and it may provide you with valuable estate tax savings. The following language would be appropriate for a bequest:

*“I give and bequeath \_\_\_\_\_ (percentage or stated dollar amount) of my estate to the Scholarship Foundation of Santa Barbara subject to its governing instruments, policies and procedures, as amended from time to time. I request the Scholarship Foundation of Santa Barbara use the eligible earnings of the gift for \_\_\_\_\_ (greatest needs, scholarships, unrestricted support).”*

---

**LIFE INSURANCE**

One of the simplest ways to make a significant contribution is to give a life insurance policy to the Scholarship Foundation of Santa Barbara. You may give a policy no longer needed, take out a new policy or name the Scholarship Foundation of Santa Barbara as a beneficiary of an existing policy and receive valuable income and estate tax savings.

---

**CHARITABLE REMAINDER TRUST**

A Charitable Remainder Trust (CRT) allows you to establish a trust for the ultimate benefit of your Fund while retaining the income generated by the assets given. A CRT may eliminate capital gains taxes, reduce or eliminate estate taxes, improve lifetime cash flow, and may provide for heirs as well.

---

**CHARITABLE GIFT ANNUITY**

With a Charitable Gift Annuity your one-time gift will pay a return for as long as you and your spouse live. Upon your death, the principal of your annuity will be placed in an endowment fund in your name. You may specify where your money is to go based on your charitable interests, or ask the Community Foundation to allocate the funds where the needs are greatest.

---

**POOLED INCOME FUND**

A Pooled Income Fund works much like a mutual fund. You receive a variable amount of income each year for life, and the assets ultimately go to the Community Foundation to benefit your charitable interests.

---

**RETIREMENT ACCOUNTS**

Qualified retirement plan accounts are subjected to layers of taxation (i.e., estate tax, federal income tax and state income tax). For some accounts, the combination of these taxes can be as high as 75-85 percent! A charitable gift of these funds, however, may provide the Scholarship Foundation of Santa Barbara with 100% of the value.

---

**CHARITABLE LEAD TRUST**

This trust allows you to provide income to your Fund for a fixed number of years. The remainder is then returned to you or a named beneficiary.

---

**LIFE ESTATE**

If you own valuable property that you would like to use during your lifetime, but make arrangements to give it to the Scholarship Foundation of Santa Barbara upon death, you may receive a current income tax deduction and future estate tax deduction.

*Planned giving is a highly specialized area. Before implementing and charitable gift planning strategy, please consult your personal financial advisor and/or estate planning advisors.*