



FAN Legacy Circle: Common Giving Streams

FAN's Endowment:

The goal of the Family Access Network (FAN) Foundation Endowment is to diversify funding to better support FAN advocate positions within schools over the long-term. In December 2009, the FAN Foundation board began an endowment managed through the Oregon Community Foundation. Donations to the FAN Endowment ensure stability during times of economic uncertainty.

Stock & Wire Transfer:

Donating appreciated stock can provide you with significant tax benefits. Your stock donation to FAN is eligible for a charitable deduction in accordance with IRS parameters. By donating appreciated stock to FAN you will avoid paying capital gains taxes on any profit.

IRA Distribution:

Working with your tax advisor, funds from your IRA can be donated (qualified charitable distributions) to FAN while you can also receive potential tax benefits. To learn more about IRA Distributions, [IRS.gov](https://www.irs.gov) has ample and up to date information on this type of charitable giving.

Donor Advised Fund:

Donor-advised funds (DAF) are an easy way to support FAN and keep your philanthropic giving simple and streamlined. Your grant from a donor-advised fund helps support programming so that students and their family members have access to FAN advocate services. If you don't already have a DAF, check with your financial planner to see if a DAF is right for you.

Mutual Funds:

Contributing long-term appreciated assets such as a mutual fund to a charity can be a highly effective tax strategy for eliminating capital gains taxes. FAN works closely with Morgan Stanley to accept transfers of mutual fund shares. Please contact us for our account number and Morgan Stanley representative.

Family Access Network
Legacy Circle Support
Executive Director: Julie Lyche
Call: 541-693-5677
Email: julie.lyche@hdesd.org
Tax ID #: 20-3534560



Bequest in your Will or Trust:

Charitable bequests in a will can be a powerful tool for reducing your estate tax. An estate may qualify for a charitable deduction for bequests of not only cash, but also property such as real estate, stock, IRAs, and other assets. Help future generations by working with your estate attorney to choose FAN as a beneficiary.

Create a Charitable Trust or Charitable Gift Annuity:

Charitable trusts, annuities, or funds are gift giving options that support FAN's mission while generating an income for you and your family.



LEGACY CIRCLE



STEP 1

Identify a cause that resonates with you

STEP 2

Work with your financial/tax advisor to identify giving vehicle

STEP 3

Let your legacy give Central Oregon kids a brighter future

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