



The Center's Legacy Circle: Information for Advisors

It is always appropriate to consult with your professional advisors when considering an estate gift. The following information can help your advisor facilitate any gift you might wish to make:

Legal Name: The LGBTQ Community Center of the Desert

Address: 1301 North Palm Canyon Dr, 3rd Floor, Palm Springs, CA 92262

Phone: 760-416-7790

Website: www.thecentercv.org

EIN: 33-0937301

Brokerage Information

The Center gratefully accepts gifts of publicly traded securities. In general, donating securities in appreciated positions will help maximize an individual's tax benefit, as the associated charitable income tax deduction is typically based on the full fair market value of the security. No capital gains tax would be payable by the donor or the Center.

For more information about gifts of securities or to request brokerage information for the Center, please contact John Batres at john@thecentercv.org or 760-203-5865.

Recommended Language for Bequests and Testamentary Gifts

Sample language for a **specific bequest** to the Center through a will or living trust:

"I give to The LGBTQ Community Center of the Desert, 1301 North Palm Canyon Dr, 3rd Floor, Palm Springs, CA 92262, Tax Identification Number 33-0937301, a California non-profit corporation, the sum of \$_____ [or _____% of my estate; or the property described herein], for its general purposes."

Sample language for a **residuary bequest** to the Center:

"I give to The LGBTQ Community Center of the Desert, 1301 North Palm Canyon Dr, 3rd Floor, Palm Springs, CA 92262, Tax Identification Number 33-0937301, a California non-profit corporation, all [or ____%] of the rest, residue, and remainder of my estate, both real and personal, for its general purposes."



Beneficiary Designation

A person wishing to support the Center through a **retirement plan, IRA, or life insurance policy**, should request a *Beneficiary Change Form* from their company or plan administrator. Beneficiary Change forms are typically available online. Please indicate the desired gift amount or percentage and return the completed form.

Other Arrangements

The Center also encourages estate gifts through other arrangements, including **Charitable Remainder Trusts** and **Charitable Lead Trusts**. However, the Center prefers not to serve as trustee for these gifts.

Purpose of Gift

People who make estate or outright gifts may designate their gift for a specific purpose. Examples include:

- The Scott Hines Behavioral Health Clinic
- The Center's Community Food Bank
- The L-Fund
- Social and Recreational Activities
- General Support

Please contact John Batres at john@thecentercv.org or 760-203-5865 for more information about these options.

Thank You!

The Center created the **Legacy Circle** to honor and recognize those who remember us with an estate gift. This provides us with an opportunity to say "thank you" during a person's life.

The Center also recognizes that some donors prefer to remain anonymous regarding a future estate gift. We will honor and respect these wishes in full. In addition, we also seek the opportunity to share our gratitude for an estate gift whenever possible.

In some cases, a client may allow an advisor to share his/her name with the Center. In others, an advisor can play a helpful role in forwarding a 'Thank You' letter to a client, while still preserving client anonymity.

If your client moves forward with an estate gift, we would appreciate any guidance about the best way to share our gratitude. We place great importance on thanking people for their confidence and generosity, while also respecting their wishes for anonymity in every instance.