



YOUR DREAMS. YOUR LEGACY. YOUR COMMUNITY.

Each of us has a “home town.” The place where we have spent a significant part of our lives, raised our families, pursued business careers and developed lasting friendships. With the Hudson Community Foundation (HCF) **David Hudson Legacy Society**, you can provide a permanent source of support for your charitable interests while generating tax savings and even personal income through deferred gifts.

GIFT TYPE	YOUR GOAL	HOW TO MAKE THE GIFT	YOUR BENEFITS
Bequest	Defer a gift until after your death.	Name HCF in your will or revocable living trust, stating a specific amount, percentage or share of the residual.	Make a gift that will be tax exempt from federal estate taxes and maintain control of the asset for your lifetime.
Revocable Living Trust	Make a revocable gift during your lifetime.	Name HCF as the beneficiary of assets in a living trust.	Arrange for a gift that will be exempt from federal estate tax, and maintain control of the trust for your lifetime.
Life Insurance	Fund your gift with life insurance proceeds.	Designate HCF as beneficiary; gift a new or existing policy to HCF.	Leveraging life insurance to fund your legacy.
Retirement Assets	Eliminate the two-fold taxation on IRAs and other qualified retirement plans.	Name HCF as beneficiary of your plan.	Remove highly taxed assets from your estate, potentially providing a larger gift to your family.
Charitable Remainder Trust	Receive income during your life.	Form a trust that will pay income during your lifetime, with HCF receiving the remainder.	Obtain immediate income tax deduction and an income for life; fund your legacy at your death.
Charitable Lead Trust	Lower gift and estate taxes on assets you pass on to your family members.	Form a charitable trust, paying fixed or variable income to HCF for a set number of years, after which, the remaining balance in the trust is passed to your family members.	Make a gift during your lifetime, and provide an estate with lower tax rates for your children.

*Consult with your personal tax advisor for detailed benefits

Frequently Asked Questions About the David Hudson Legacy Society

How do you become a David Hudson Legacy Society member?
By naming the Foundation as a beneficiary in your estate plan.

How are you added to the list?
By completing a Legacy Society Reply Form and returning it to the address listed. Our staff will promptly contact you to discuss the details and benefits of naming the Foundation as a beneficiary in your estate plan.

What benefits do you receive as a David Hudson Legacy Society member?
If you agree, your name will be published in the Foundation’s Annual Reports and other publications; you will receive invitations to Foundation events; and you will gain a sense of well-being, knowing you are supporting your community forever.



JOINING THE DAVID HUDSON LEGACY SOCIETY

Our David Hudson Legacy Society honors those who have included a planned gift to any of the current funds or will use a planned gift to establish a fund at Hudson Community Foundation.

Here's how to join the David Hudson Legacy Society:

1 Arrange through your estate to leave a gift.

Common ways to do this are:

- Bequest Through Your Will or Trust
- Revocable Living Trust
- Life Insurance Policy Beneficiary Designation
- Retirement Assets
- Charitable Remainder Trust
- Charitable Lead Trust

Note: We recommend you discuss these options with your family, attorney, accountant, insurance agent or financial planner as appropriate. You may also contact the Foundation office to discuss the various ways to leave your legacy through Hudson Community Foundation.

2 Inform Hudson Community Foundation that you have made the necessary arrangements by returning the form below.

- I/We have made a provision in my/our estate plans for the benefit of Hudson Community Foundation and wish to be included in the David Hudson Legacy Society.
I/We agree to be included in published listings of the David Hudson Legacy Society's members.

Please print name(s) as you wish to be listed

- I/We have made a provision in my/our estate plans for the benefit of Hudson Community Foundation and wish to be included in the David Hudson Legacy Society.
Please do not list my/our name(s) in any published listings of the David Hudson Legacy Society's members as I wish to remain anonymous.

Signature

Date

Phone #

Email