



## Recurring Staff Giving Authorization

Name \_\_\_\_\_ Employee No. \_\_\_\_\_ Community \_\_\_\_\_

Street Address \_\_\_\_\_

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

Telephone \_\_\_\_\_ E-Mail \_\_\_\_\_

*I understand my Recurring Giving is to be used solely as a contribution for the charitable activities of Acts Legacy Foundation. I understand I may stop my Recurring Giving by notifying the Foundation. For tax purposes, a summary of my charitable gifts will be sent to me in January.*

**How do you want to give?**

**Payroll Authorization**

I authorize Acts Retirement-Life Communities to add \$\_\_\_\_\_ each payroll.

**Automatic Credit Card Billing Authorization**

I authorize Acts Legacy Foundation to add \$\_\_\_\_\_ each month to my credit card. *Recurring credit transactions will occur on the 15<sup>th</sup> of each month. If the 15<sup>th</sup> falls on a weekend, the transaction will be processed the following Monday.*

**Authorization:**

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Where do you want to help?**

**Please designate my gifts to the following Fund(s):**

- Acts Employee Catastrophic Fund
- Acts Samaritan Fund
- Samaritan Fund at my Community - \_\_\_\_\_
- Other - \_\_\_\_\_

**Please fill out the following only for Automatic Credit Card Billing:**

- Visa    Mastercard    Discover    American Express

Name as it appears on the card \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

□□□□-□□□□-□□□□-□□□□

Expiration Date □□-□□    CCV# □□□ on card back

**Return to:**

**Acts Legacy Foundation**  
420 Delaware Drive, P.O. Box 2222, Fort Washington, PA 19034  
Foundation@actslife.org



Where Loving-Kindness Gives

Acts Legacy Foundation, Inc. recommends you discuss charitable opportunities with your attorney, financial planner, tax advisor and/or family members before making any substantial gift. If you itemize, your gift is tax-deductible to the full extent of the law. The Foundation will use your gift for the designated purpose. If this need no longer exists or determined by the Board of Directors to no longer be prudent, then it may be applied to an area of greatest need. Investment returns for gifts with permanent restrictions (Endowed) and gifts for Capital Campaign related projects will remain with the principal for that purpose until the funds are required to fulfill your charitable intentions. *Of your total gift, 95% benefits your designated purpose, with the remaining 5% being used for administration of the charitable programs.* If you desire personal contact to discuss your charitable giving opportunities, please contact Ray Boyle at 877-287-0799. Acts Legacy Foundation is a public charity organized in the state of Delaware and located at 420 Delaware Drive, P.O. Box 2222, Fort Washington, PA 19034

## WAYS TO GIVE

### Cash

A gift of cash is the simplest way of giving. A recurring monthly charitable gift can be added to your maintenance statement. Pledges are accepted and can be paid over a two-year period. A pledge often enables a donor to contribute a larger gift if it is spread over a longer period of time.

### Stocks

Gifts of securities of appreciated value provide significant tax advantages to the donor and make this giving method highly attractive. Money market funds also make excellent gifts.

### Life Insurance

A gift of a life insurance policy may provide an easy way to make a substantial gift. This is particularly appropriate where the insurance policy is no longer needed in your estate planning. A policy can be assigned to Acts Legacy Foundation whether it is paid up, partially paid up, or is a new policy.

### Bequests

A charitable gift, made by a will, can provide estate tax savings while ensuring that Acts is supported in the future. You can include charitable gifts in the form of specific property (cash, securities, works of art, etc.), a percentage of your estate, or the remainder of your estate. Your attorney can help you plan the most appropriate type of bequest.

### Gift Annuities

In exchange for a gift of cash or securities, Acts Legacy Foundation will pay you a fixed annual amount. The rate of the annuity is based on the age of the annuitant. You will incur no immediate capital gains tax on the transfer, part of the annuity payment will be tax-free, and you will receive an income tax deduction for your gift.

### Individual Retirement Accounts

Depending on your age, individuals may make a Qualified Charitable Distribution up to \$105,000 from their IRA directly to Acts Retirement-Life Communities, Inc. Rather than benefiting from a charitable deduction for such gifts, you do not have to count the gift as taxable income. Such a gift can take the place of required minimum distributions, which would otherwise be taxed. You may also name Acts as beneficiary of a portion of your IRA or qualified retirement fund. This can be a percentage or even the entire amount; if you have no heirs, Acts can be designated to receive the leftover funds in a tax-free lump sum.

### Matching Gift

Many companies are willing to match the charitable donations made by current and retired employees. Please check with your company to find if your gift might be matched.

### Donor Advised Funds (DAF)

A donor advised fund is set up for the sole purpose of supporting charitable organizations where donors are eligible to take an immediate tax deduction.

**Attention Florida Residents:** FLORIDA REGISTRATION NUMBER: CH47258 AND CH665. A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. **Attention Georgia Residents:** The following information will be sent upon request: (A) A full and fair description of the programs and activities of ALF; and (B) A financial statement or summary which shall be consistent with the financial statement required to be filed with the Secretary of State. **Attention Maryland Residents:** A copy of the current financial statement of Acts Legacy Foundation, Inc. is available by writing to Acts Legacy Foundation, 420 Delaware Ave., PO Box 2222, Fort Washington, PA 19034 or by calling (877) 287-0799. Documents and information submitted under the Maryland Solicitations Act are also available, for the cost of postage and copies, from the Maryland Secretary of State, State House, Annapolis, MD 21401, (410) 974-5535. **Attention New Jersey Residents:** INFORMATION FILED WITH THE ATTORNEY GENERAL CONCERNING THIS CHARITABLE SOLICITATION AND THE PERCENTAGE OF CONTRIBUTIONS RECEIVED BY THE CHARITY DURING THE LAST REPORTING PERIOD THAT WERE DEDICATED TO THE CHARITABLE PURPOSE MAY BE OBTAINED FROM THE ATTORNEY GENERAL OF THE STATE OF NEW JERSEY BY CALLING (973) 504-6215 AND IS AVAILABLE ON THE INTERNET AT <http://www.state.nj.us/lps/ca/charfrm.htm>. REGISTRATION WITH THE ATTORNEY GENERAL DOES NOT IMPLY ENDORSEMENT. **Attention North Carolina Residents:** Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989 (within North Carolina) or (919) 807-2214 (outside of North Carolina). The license is not an endorsement by the State. **Attention Pennsylvania Residents:** The official registration and financial information of Acts Legacy Foundation, Inc. or Acts Retirement-Life Communities, Inc. may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.