Team Member Recurring 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 15th of each month. If the 15th 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

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 or automatically billed monthly to your credit card.

INDIVIDUAL RETIREMENT ACCOUNTS
Depending on your age, individuals can make a Qualified Charitable Distribution up to $108,000 from their IRA directly to Acts. 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.

DONOR ADVISED FUND
Do you have a Donor-Advised Fund? If so, please consider making your Acts community a beneficiary with a grant recommendation. You can specify a fund, campaign, or purpose for your grant recommendation. You may also make grant recommendations “in honor of” or “in memory of” a loved one.

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.

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.

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 fully paid, partially paid, 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.

MATCHING GIFTS
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.

PLEDGE
Pledges are encouraged and can be contributed through cash or stock. A pledge is an opportunity to make a significant gift that can be spread over a two-year period.

Acts LEGACY FOUNDATION
Where Loving-Kindness Gives

Acts Legacy Foundation, Inc. recommends you discuss charitable opportunities with your attorney, financial planner, tax advisor and/or family before making any substantial gift. If you itemize, your gift may be 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 gift total, 95% benefits your designated purpose, with the remaining 5% being utilized 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 501(c)(3) public charity organized in the state of Delaware and located at **420 Delaware Drive, PO Box 2222, Fort Washington, PA 19034.**

Acts Legacy Foundation (“ALF”) is a Delaware not-for-profit organization that supports the programs and mission of Acts Retirement-Life Communities, Inc. (“ARLC”), a Pennsylvania not-for-profit organization. Financial and other information about ALF’s and ARLC’s purpose, programs and activities can be obtained by contacting Ray Boyle at 420 Delaware Drive, P.O. Box 2222, Fort Washington, PA 19034, phone number (877) 287-0799, website ActsLegacyFoundation.org, or for residents of the following states, as stated below. **Florida:** 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. **Georgia:** 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. **Maryland:** Copies of documents and information submitted by ALF are available for the costs of postage and copying, from the Maryland Secretary of State. **New Jersey:** 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. **North Carolina:** 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. **Pennsylvania:** 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.

If you do not wish to receive charitable requests in the future, please notify us at Acts Legacy Foundation, 420 Delaware Drive, Fort Washington, PA 19034.