

Gifts of Stock:

To make a gift with stock, you may transfer the shares directly to the Longmeadow Adult Community Center Fund. If you are using appreciated stocks to fund your gift, you will receive a tax deduction for the gift amount and you will save on capital gains tax.

Simply provide your broker with detailed instructions of the gift that you would like to make to the LACCF. Please include the name of the stock and the number of shares to be transferred from your account to the LACCF account at:

Raymond James
LACCF account # 1814T784
Clearing # DTCC 0725

Bequests & Estate Plan Gifts:

A bequest is a **gift from your estate** – a transfer of cash, securities or other property made through your estate plans. You can make a bequest to the LACCF by including language in your will or living trust leaving a portion of your estate to the Fund by designating the LACCF as a beneficiary of your retirement account or life insurance policy.

Remembering the LACCF with a bequest from your estate will help sustain and strengthen support for the Longmeadow Adult Community Center for years to come. Some of the advantages of creating a bequest include:

- *A bequest costs nothing now, yet gives you the satisfaction of knowing you have provided for the Fund in the future.*
- *You retain control of and use of your assets during your lifetime.*
- *You may modify your bequest if your circumstances change.*
- *Gifts to the LACCF from your estate are exempt from federal estate taxes.*
- *If you let the LACCF know of your plans to leave a bequest, we will be able to thank you now and recognize your generosity on our Wall of Honor.*

Making a Bequest:

A **bequest to the LACCF** can be made for specific amount, for a percentage of your estate or for all or a portion of what is left after you have made bequests to your family. To make a gift to the LACCF from your estate, you must sign a new will or living trust instrument, add a codicil to your present will, or make an amendment to your present trust instrument.

Alternatively, you can designate the LACCF/Longmeadow Council on Aging as a beneficiary of a retirement plan or life insurance policy. To do so, contact the retirement plan administrator or life insurance company and complete the appropriate beneficiary designation form.

QUESTIONS? Please contact: Marybeth Bergeron, President, LACCF at
LACCFDirector@gmail.com or (413) 262-7661
www.LongmeadowAdultCenterFund.org