

InSpirit Center for Spiritual Living, Orange County

From the Senior Minister

It's an incredible honor to be writing you today-thank you for everything you're doing to support the InSpirit Community. I know you care deeply about the importance of spiritual consciousness in the world today.

Now, after 21 years from beginning our ministry, we are at an important moment to begin the creation and implementation of a legacy that will continue the work of our center and the community moving forward. InSpirit has been a place of connection, renewal of the spirit, and rejuvenation of the soul. We want to provide a means to continue this work for the *next* 21 years.

As a non-profit organization, InSpirit is sustained by the generosity of our community who donate their time, money and treasures to help us fulfill our vision. InSpirit's vision is to continue to be a place where God's love illuminates hearts and minds and continues to be a sanctuary where people grow closer to God, creation, and one another. We take great pride in what we, collectively, have created!

I am writing you today to ask for your help in establishing a new program - a Legacy Program for InSpirit. This fund will allow us to continue our work now and in the future.

Charitable giving is a key component of our non-profit's financial success. Your tax-deductible gift (if you itemize your deductions) can make a tremendous difference in the future of our community. Gifts can be in the form of money, stocks, and other real property (certain rules apply). In addition, for the first time at InSpirit, you can designate us as a beneficiary to your IRA accounts, will, or adding us as beneficiary on your life insurance policy or financial account.

We have a team in place who can help you understand the different options available to you. The following pages describe the Legacy Program and how to use it. We also have policies for gift acceptance and investment available for you, on request, so that you may realize the careful planning of this program. Thank you in advance for considering a Legacy Program gift to our InSpirit Center for Spiritual Living.

InSpirit Center for Spiritual Living, Orange County

InSpirit Legacy Program

Please fill out one form per person. Thank you.

When you complete the attached form indicating you have made or plan in the near future to make a legacy gift, you are enrolled in our Legacy Program. Legacy gifts are arranged now but realized in the future as part of your estate plans. The most common gift is a Bequest of cash or property in your Will or Trust.

The InSpirit Legacy Program is formed in recognition of the caring supporters of our spiritual heritage who have expressed their passion for the continuation and well-being of our Center by including our organization in their Wills, Trusts and other Estate Plans.

With my signature below, I confirm that I qualify and wish to be a member of the InSpirit Legacy Program, with all the Rights and Privileges thereto.

Confirmation of Commitment:

I, _____, confirm that I:
(print full name as you would like it used for recognition, if applicable)

- Have named the **Center for Spiritual Living Orange County** (our legal name) as a Beneficiary in my Will, Trust or other Estate Plan, or
- Have named the **Center for Spiritual Living Orange County** (our legal name) as Beneficiary of a Life Insurance policy or other asset, or
- Will do so in the next six months.
- Would like more information. Please contact us.

Recognition Request:

- I would like my name above to be included in **Legacy Program** donor lists.
- I would prefer to remain anonymous during my lifetime.
- I would prefer to remain anonymous in perpetuity.

Rights & Privileges:

1. To be invited and recognized at all **InSpirit Center for Spiritual Living** receptions and special events. Request for anonymity is always honored.
2. To be recognized in appropriate **InSpirit Center for Spiritual Living** publications, both digital and print.
3. To have the right to amend my estate plans at any time. I will inform the **InSpirit Center for Spiritual Living** administrator of any plan for such a change.

Signature

Date

Address (Please print legibly)

City, State, Zip/Postal Code

Country

(_____) _____
Phone

Email

InSpirit Center for Spiritual Living, Orange County

Your Charitable Bequest

A Will is perhaps the most important document you can have. It is critical to making sure your wishes are carried out exactly as you desire. Your charitable bequest can either be Specific or Residual.

A Specific Bequest is a gift of a specific dollar amount or an asset such as personal property, real estate, stocks and bonds, or a bank or brokerage account, among other assets.

Sample Specific Bequest language: “I give, devise, and bequeath to the **Center for Spiritual Living Orange County**, California, Federal Tax ID number 91-2018693, the sum of (\$_____) or (a Specific asset such as “my personal residence located at (_____ ”), to best promote the objectives and mission of the InSpirit Center.”

A Residual Bequest is distributed after all your estate’s expenses and specific bequests are honored. In this way you can be assured all your beneficiaries are treated fairly and your wishes are honored, no matter what the value of your estate may be.

Sample Residual Bequest language: “I give, devise, and bequeath to the **Center for Spiritual Living Orange County**, California, Federal Tax ID number 91-2018693, (____ %) of the remainder of my estate, to best promote the objectives and mission of the InSpirit Center.”

Your Beneficiary Designations

The easiest (involving no legal fees at all) legacy gift to arrange is a beneficiary designation. Simply contact your advisor or financial institution to designate the InSpirit Center as a beneficiary of your bank or brokerage account, annuity, or life insurance policy, that would be no longer needed for its original purpose, such as an investment, financial account or retirement fund. Remember, IRA funds are taxed very heavily -perhaps 50% - unless left to a non-profit organization such as InSpirit.

After you make the change, please advise the InSpirit Center that you have done so.

Questions

If you or your advisor or attorney have any questions about arranging your Spiritual Legacy Program, please contact the **InSpirit Center for Spiritual Living** administrator at 949-481-4040 or at admin@inspiritoc.org.

The InSpirit Center for Spiritual Living, Orange County, is a not-for-profit 501(c)(3) public charitable organization (DLN 29053028307000).