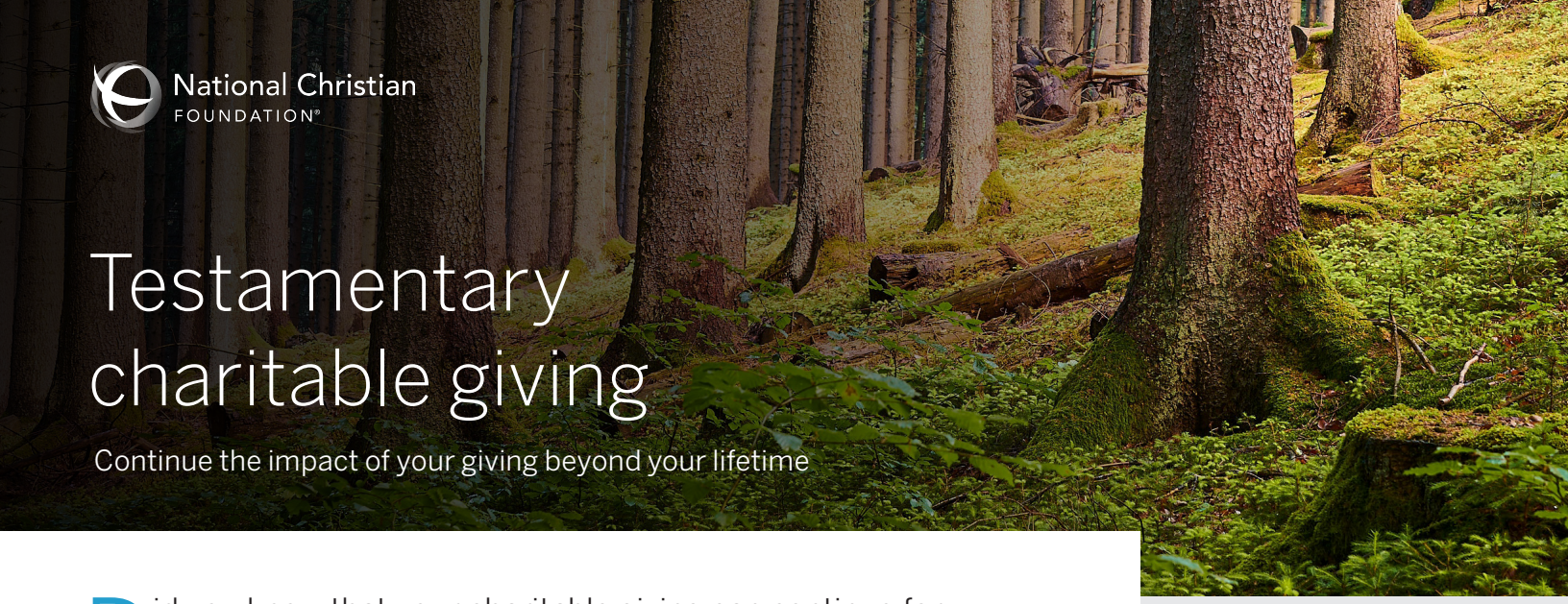
National Christian FOUNDATION®



Testamentary charitable giving

Continue the impact of your giving beyond your lifetime

Did you know that your charitable giving can continue for generations to come? Naming your Giving Fund at the National Christian Foundation (NCF) as the beneficiary of all or a portion of your estate through a will, trust, insurance policy, and retirement plan is a strategic way we can help you give beyond your lifetime.

Testamentary charitable giving allows you to continue funding your giving goals through your Giving Fund at NCF, while also potentially reducing your estate tax burden. After your estate is settled and proceeds are available in your fund, grants may be distributed to your favorite charities – or to separate funds for your family members – based on a succession plan you provide to NCF through our website.

You can easily update your succession plan as often as you wish, without going through the costly expense of amending your legal documents.



Name your Giving Fund in your estate documents

Work with your advisor to name your fund at NCF in your will, trust, insurance policy, or retirement plan.



Notify NCF of your plans

Connect with your NCF team to let us know your future plans and to brainstorm other opportunities for charitable impact.



Create a succession plan

Log in to your fund on NCF's website to create a succession plan, or contact your NCF team for more customized options.

Learn more or get started today

Visit us at ncfgiving.com/carolinas or call us at 704.716.2900

Discover an even greater legacy of giving

In addition to testamentary charitable giving from your estate, your NCF team can help you create a Giving Strategy™ that applies a scriptural perspective to areas of generosity in your life, including your family legacy.

We'd love to explore ways to prepare the next generation to handle wealth and giving, so they maximize their impact for God's kingdom.

Learn more today at **ncfgiving.com/strategy**



Three keys to testamentary charitable giving with NCF

1. Include your Giving Fund at NCF in your estate documents

As you and your advisor determine that testamentary charitable giving is appropriate for your financial and philanthropic planning, name your Giving Fund in your estate documents by completing and including the following paragraph:

> The legal document that will direct the assets to the Giving Fund should be noted as follows: National Christian Charitable Foundation, Inc. (TIN# 58-1493949, 1150 Sanctuary Pkwy, Suite 350, Alpharetta, GA 30009) or one of its supporting organizations (collectively "NCF"), as may be determined by NCF, subject to NCF's governing instruments, policies and procedures, as amended from time to time. This distribution is designated for The _____Giving Fund (#_____).

2. Notify NCF of your plans

Contact your NCF team and provide a copy of the specific estate document that names your Giving Fund as a beneficiary. When NCF is notified of your passing, we'll work with your legal or tax advisors to ensure that testamentary gifts are distributed to your Giving Fund at NCF.

Testamentary gifts will be subject to NCF's annual administrative cost allocation. Upon receipt of a testamentary gift, up to a .90 percent initial assessment may be applied by NCF to cover costs of estate settlement, distribution, and administration. If such costs exceed this amount, NCF reserves the right to collect grant dollars sufficient to cover our costs.

3. Create a succession plan for your Giving Fund

A succession plan guides NCF in distributing the balance in your fund after your lifetime, and it's an important part of faithfully stewarding all the resources God has entrusted to you.

In your plan, you may name successors, charities, and/or NCF's ministry to receive distributions or grants from the fund balance.

Each succession plan is for a single fund at NCF. If you have multiple funds, please create a succession plan for each fund. You can create or update your plan by logging in to your fund, visiting the legacy page, and clicking the start button.

If you'd like to discuss a customized plan, contact your NCF team.

Learn more or get started today

Visit us at ncfgiving.com/carolinas or call us at 704.716.2900

Specialized estate strategy: Disclaimer funded DAF option*

This creative strategy gives your estate beneficiaries (children, grandchildren, etc.) the ability to disclaim some or all of their inheritances within nine months following your death, in which case the money goes to their Giving Funds at NCF.

To the extent that a beneficiary exercises this disclaimer, the value properly disclaimed may not be subject to estate taxes.

*NCF strongly urges that you consult with your attorney, financial advisor, insurance agent and/or tax advisor to review and approve this complimentary educational information. This information in no way constitutes legal advice. It is intended to be broadly educational in nature with reference to information you have shared concerning your situation. We will gladly work with your independent advisors to assist in any way.