



LA CASA NORTE was founded on the concept that housing is a basic human right. Since 2002, La Casa Norte's mission has been to serve youth and families confronting homelessness, and to act as a catalyst to break the cycle of poverty.

LA CASA NORTE is fortunate to have a loyal group of donors who have helped us serve thousands of youth and families over the years and build the organization we are today. Together we have made great strides in reducing homelessness, but there is still so much more to do.

THE LEGACY PROJECT is a powerful tool to help preserve La Casa Norte's mission for many years to come, while meeting donors' current personal and financial goals. It is a way to leave an enduring imprint on the organization and help us build a better tomorrow.

The following information is intended to provide you with some ideas for planned giving, as the basis for further conversation with your financial advisor or attorney.

If you have already included La Casa Norte in your financial plans, please let us know so we can express our gratitude and ensure that your wishes will be met.



PLANNED GIVING OPPORTUNITIES

CHARITABLE BEQUEST

You may leave a legacy by including a gift of cash, securities, real estate, or other assets in your will or trust. Bequests can be a specific sum or asset or a percentage of your estate. The value of your bequest to La Casa Norte is deductible for estate tax purposes.

RETIREMENT ASSETS

Retirement accounts, including IRAs, 401(k)s, and 403(b)s, are another vehicle that can be used to create a legacy. You can name La Casa Norte as a beneficiary of your retirement accounts, either in whole or for a specific amount or percentage of the account.

CHARITABLE GIFT ANNUITY

This deferred gift arrangement allows you to make a gift of cash or appreciated assets and receive a fixed amount of income for life for you and one other individual. The minimum amount required to establish a gift annuity with La Casa Norte is \$15,000.

CHARITABLE REMAINDER TRUST

A Charitable Remainder Trust is a gift arrangement that enables you to make a gift and receive income payments for a lifetime or period of years. Trusts can be funded via cash, securities, and illiquid assets such as real estate. If the trust is funded with appreciated assets, you may be able to avoid paying income tax on the amount of capital gain that is recognized upon the sale of the assets. A minimum gift of \$100,000 is required to establish a charitable remainder trust with us.

LIFE INSURANCE

You can name La Casa Norte as the beneficiary of your life insurance policy. At the time of the insurance distribution, your estate would receive an estate gift tax deduction. Alternatively, a fully paid-up policy may be transferred to La Casa Norte, and you will receive a charitable income tax deduction at the time of the gift.