



“Giving Beyond Your Years” Planned Giving Guidelines

We invite you to include The Outdoor Circle in your planned giving, in whatever form is appropriate for you, knowing that your gift will continue to live on in perpetuity and bless our community with beauty for generations to come.

A planned gift also makes your core values known while supporting the long-term success for an organization whose work you value. You need not be wealthy to leave a legacy gift. Gifts in any amount, large or small, are greatly appreciated. We encourage you to consult with your financial advisor to discuss the following ways to make a gift or bequest to The Outdoor Circle.

In addition to supporting our work through your generous annual donation, here are other ways you can contribute to the sustainability of The Outdoor Circle for both its present and future needs.

The Easiest Planned Giving Options:

IRA DISTRIBUTIONS ~ If you are age 70-1/2 or older, you may instruct your IRA custodian to transfer any amount up to \$100,000 directly to The Outdoor Circle, which may fulfill some or all of your Required Minimum Distribution requirements and helps support our mission.

LIFE INSURANCE POLICY AND RETIREMENT PLAN ASSETS ~ Often overlooked by donors, naming The Outdoor Circle as a partial or full beneficiary of your retirement fund assets, such as IRA, 401(K) or 403(B), can provide support for our mission.

Other Planned Giving Options:

LIFE INCOME ~ Life income gifts allow you to leave a gift in the care of The Outdoor Circle, while receiving income during your lifetime. The two most popular are a Charitable Remainder Trust or a Charitable Gift Annuity. We work with the Hawai'i Community Foundation, as needed, to realize these gifts.

BEQUESTS ~ Naming The Outdoor Circle as a beneficiary in your will or living trust allows you to bequest a particular dollar amount or a percentage of your estate.

SECURITIES ~ If you own stocks, mutual funds, or other securities that have increased in value, and you have held for more than one year, there may be special tax benefits associated with making them a charitable gift.

COMPLEX GIFTS ~ If you are a business owner, own real property, or have any other type of complex asset, please contact us for differing giving options.

Mahalo for including The Outdoor Circle in your current and planned giving. Your philanthropic support sustains our organization's extraordinary legacy and vision of protecting Hawai'i's unique natural beauty for future generations.

More details are available online at: www.outdoorcircle.org/give-beyond-your-years.html

For more information or guidance on planned giving, please contact us at:

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