



**Giving  
to  
Clark**

The Clark Foundation is the fundraising arm of Clark Retirement Community. We rely on generous support from donors in order to fulfill our commitment to lifelong care and to enrich the Clark community. In addition to the planned gifts explained in this brochure, Clark also offers many other ways to give, including:

- monthly giving
- annual giving
- gifts through a charitable gift annuity
- gifts of life insurance
- gifts of securities or stock

Our staff is available to answer questions or to help you evaluate your options. Thank you for considering the needs of your neighbors and friends at Clark Retirement Community through your gifts!



1551 Franklin Street SE  
Grand Rapids MI 49506

(616) 452-1666 ext.121

[www.ClarkRetirement.org/Foundation](http://www.ClarkRetirement.org/Foundation)

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Planned  
**GIFTS**



## The JOY of a Legacy

Philanthropic giving is something that you can enjoy during your lifetime. You can also have the pleasure of knowing that you have fulfilled your philanthropic dreams by providing Clark Retirement Community with a planned gift after you are gone.

A planned gift is different from a typical charitable contribution in two ways. First, the charity receives the funds after your death. Second, the gift comes from your estate, not from the discretionary income that you are living on now. This may allow you to make a larger planned gift than you would be able to make during your lifetime.

Three of the most common ways to leave a planned gift are as follows:

- Make a bequest in your will or trust that designates either an amount of money or a percentage of your estate to go to Clark.

- Designate Clark as the beneficiary of a financial instrument such as a life insurance policy, 401(k), or retirement plan.
- Give a gift of a specific asset, such as art work or personal property.

A planned gift will be gratefully received by Clark, and it can also help reduce your overall estate tax as well. For example, one of the most highly-taxed assets of your estate is your retirement plan. If you designate Clark as the beneficiary for this account, you are removing the most-taxed asset from your estate, freeing up other, more favorably taxed assets to give to family and heirs.



## Honoring Your GIFT

The Clark community of generous donors allows us to keep our commitment to lifelong care, and to enrich the lives of our residents in many ways. If you choose to advise Clark of your planned gift, we will thank and honor you through membership in our Heritage Society.

## What Should You Do?

Please contact your financial advisor and/or attorney if you would like to leave a planned gift to Clark. They can provide appropriate advice about how to execute your plans while minimizing tax implications and maximizing your gift.

## Learn More

If you would like to learn more about planned giving or any other giving options, please visit the Clark Foundation office or call (616) 452-1666 ext.121.



## How Does It Work?