



# AN IMPACT THAT LASTS



**Kiwanis**<sup>®</sup>  
CHILDREN'S FUND

## BECOMING SOMETHING GREATER

You're a part of the Kiwanis family, and Kiwanis is a part of you. The organization's mission — to serve the children of the world — could even be described as a fundamental part of your values.

Ultimately, your membership has become something greater than a list of projects or activities. It's a testament to the mark that a person's generosity can make in the world. In particular, the impact of a Kiwanian.

You've helped make great things happen — from your club's work in your own community to the international impact of initiatives that involve the whole Kiwanis family. You've seen the results, and you've taken pride in them. The full bellies of hungry children. The smiles of kids enjoying the first playground that ever included them. The thousands of lives saved around the world by vaccines, education and other resources that had previously been inaccessible.

You've volunteered. You've raised funds. You've helped make Kiwanis what it is: an international organization whose members make a difference near and far. Now it's time to think bigger than ever. It's time to consider your permanent impact.





## The need will endure

Any gift to the Kiwanis Children's Fund helps Kiwanians reach kids around the world. But with a gift from your will or estate, you ensure that Kiwanis will be changing children's lives well beyond your own lifetime.

After all, kids need Kiwanis. And that need won't end. Consider this: Of the world's 2.2 billion children, 2 billion live in developing countries. And some 15,000 kids die from preventable causes *every day*.

All children deserve the attention of an organization like ours. But reaching them all requires a long-term effort. And that means more than simply ensuring the survival of Kiwanis. It means helping us grow and thrive over time — to meet the needs of a changing world.

Because it will change. You can help us keep fulfilling our mission when it does, whatever the future brings.

Kids will need Kiwanis for a long time to come. You can see it even now, in the size and scope of today's most difficult problems:

- Nearly half of children's deaths are from malnutrition.<sup>1</sup>
- 1 in 5 kids live in a conflict zone.<sup>2</sup>
- Each year, iodine deficiency puts nearly 19 million newborns at risk of brain damage.<sup>1</sup>
- 263 million children and teens — disproportionately girls — are not in school.<sup>1</sup>

1. UNICEF

2. Save the Children





## Imagine the impact

Imagine a world in which every community has a Kiwanis club. And imagine every club with the resources to meet every need it sees. Imagine: hungry kids getting food, underprivileged kids going to summer camp, kids at crucial ages getting access to a library of books. And so much more.

As Kiwanians, our dream for the future is only possible if we invest in it today.

Think of what we already do as a worldwide community of clubs. The international impact of initiatives such as The Eliminate Project and the fight against iodine deficiency disorders. The local impact of club and district service projects, as well as disaster relief. Leadership and development for Kiwanis-family members of all ages.

Now imagine this impact growing larger and going farther. More clubs. More Kiwanians. More funding for more service. More of the kind of effort and generosity that *you* put into the world.

We can't make more of you. But we can extend the values that make you who you are. With your help, we will someday have enough people like you that we can reach every kid who needs us in every community they call home.



## Ready for a new era

For the Kiwanis Children's Fund, the time is now. We've done the work to earn our status as a respected non-profit, with some of the highest rankings possible from charity watchdogs. We're a trusted partner, staffed by experts, and we know how to turn money into something meaningful.

We're poised to help move Kiwanis into a new era. Kiwanis International has a strategic plan designed as a guide toward greater growth, impact and financial strength. The Children's Fund is a key part of that plan. After all, financial resources are the linchpin for any organization's vision of the future.

So are the people who help provide those resources — and that future. In fact, the Children's Fund has seen members like you make such things happen. Through initiatives like The Eliminate Project, we've been stewards of gifts from donors who respond to the call of a major opportunity. And we've learned from the lessons such a project offers: where to stretch, how to grow, ways to invest in our capacity to reach big goals.

Now we're ready. The Children's Fund is seeking partners who are equally eager to commit to our long-term future — and invest in the journey that will take us there.





## Your values live on

You may never have thought it was possible — to make a difference in kids' lives even after you're gone. But with a gift through your will or estate to the Kiwanis Children's Fund, that's what you do.

It's also the kind of gift that allows you to use your assets strategically. This way, strengthening Kiwanis is a way of achieving your own most ambitious philanthropic goals.

Your estate doesn't have to be large to make a difference. The experts at the Children's Fund can work with you to determine an approach that makes sense for you. We can also explore how it helps you keep your commitment to your family's financial security.

However you choose to transform your Kiwanis impact — and the values that inspire it — we're here to help make it happen. We welcome the opportunity to be your partner in the opportunity of a lifetime.

Think about the resources you spend to insure your valuables. With an estate gift to the Kiwanis Children's Fund, you ensure your values.







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# TYPES OF ESTATE GIFTS: WHAT YOU NEED TO KNOW

You are passionate about Kiwanis. You have seen the difference our members make on their communities and on the lives of children around the world. You can have a profound impact on Kiwanis' ability to serve future generations by making a gift to the Kiwanis Children's Fund in your will or through other estate plans. Start here by learning the options available to you. We will work with you to find a plan that lets you provide for your family, meet your financial goals and support Kiwanis International.

## Will planning: The simplest form of giving

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An easy and popular way to leave a legacy is by making a gift to the Kiwanis Children's Fund through your will or living trust. The bequest can be a percentage of your assets or a fixed amount. Simply have your attorney use this language: "I give, devise, and bequeath to the Kiwanis Children's Fund, whose international office address is 3636 Woodview Trace, Indianapolis, Indiana 46268, [written amount or percentage of estate] for its unrestricted use and purpose."

**BENEFITS:** Bequests are a simple and flexible way to support Kiwanis. Rather than a fixed sum, you can leave a percentage — allowing your gift to be proportional to other bequests and giving you the ability to provide for your family.

## Beneficiary designations: A flexible way to give

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Naming the Children's Fund as a beneficiary to receive assets after you are gone is an easy way to leave a lasting mark on Kiwanis. There are two primary ways to make a beneficiary designation:

**Life insurance beneficiary:** Make the Children's Fund a primary or secondary beneficiary.

**Retirement plan beneficiary:** Make a gift by naming the Children's Fund as a remainder beneficiary in your 401(k) or IRA.

**BENEFITS:** Like a will, this is a simple way to remember Kiwanis. You can update your beneficiaries whenever you want, at little or no cost. In addition, you pay no income taxes if retirement assets or life insurance proceeds pass directly to the Children's Fund.

## Life estate gift: The security of home

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Perhaps you want to make a significant gift to the Kiwanis Children's Fund but don't want to relinquish liquid assets. Through a life estate gift, you can transfer the title of a qualified house or farm to the Children's Fund while continuing to live in the residence for the rest of your life. You are responsible for property insurance and real estate taxes, but because the gift cannot be revoked, you can qualify for a federal income tax charitable deduction for a portion of the home's value in the year the gift is made. The Children's Fund receives the property at the end of the life estate term (usually your lifetime).

**BENEFITS:** A life estate gift can simplify the settlement of your estate because executors are relieved of any expenses and delays that can be associated with the transfer of property at death.

## Charitable gift annuity: Gifts that pay you income for life

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You can provide for the Kiwanis Children's Fund while feeling secure about your own financial future. With a charitable gift annuity, you make a gift to the Children's Fund — and through an agreement, we pay you a fixed amount each year for the rest of your life. The remaining amount of the gift will support the mission of Kiwanis International.

**BENEFITS:** When you create a charitable gift annuity, you can qualify for various tax benefits, including a federal income tax deduction. Your capital gains taxes and estate taxes could also be reduced.

## Charitable remainder trusts: Giving while generating income

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A charitable remainder trust can generate potential income for you while you support the Kiwanis mission. These trusts offer you a potential income stream from the assets you give to the Children's Fund for up to 20 years. There are two types of charitable remainder trusts:

**Charitable remainder annuity trusts:** Each year, the annuity trust pays you a fixed dollar amount, which you choose when you create the trust. The payments do not vary regardless of fluctuations in the trust investments.

**Charitable remainder unitrusts:** Each year, you are paid a variable amount based on a fixed percentage of the trust asset's fair market value. The amount you receive is determined annually. For example, if the value of the trust increases, so do your payments. However, if the value drops, so will the amount of money you receive.

**BENEFITS:** No capital gains taxes are paid when the assets are transferred into the trust. You may also be eligible for a partial charitable income tax deduction, and your heirs may see estate tax savings.

## Charitable lead trusts: Preserve assets for your heirs

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The creation of a charitable lead trust pays income to the Kiwanis Children's Fund for a set period. When the term ends, you or a beneficiary receive the remainder of the trust assets. There are two types of lead trusts that can make payments to the Children's Fund:

**Charitable lead annuity trust:** Pays a fixed amount annually to the Children's Fund and is more attractive when interest rates are low.

**Charitable lead unitrust:** Pays annually to the Children's Fund a variable amount that is dependent on the value of the assets in the trust. If the value increases, payments to the Children's Fund also increase.

**BENEFITS:** These trusts reduce the potential taxes owed by your heirs upon inheriting the remaining trust balance.

This information is not intended for legal or tax advice. Please consult an attorney, tax advisor or financial planner. References to tax benefits are based on federal taxes only and are subject to change.



# ESTATE GIVING AT A GLANCE

WAYS TO GIVE	HOW IT WORKS	WHAT BENEFITS YOU RECEIVE
<b>WILL PLANNING</b>	Name the Kiwanis Children's Fund in your will or living trust.	Simple and flexible. Provide for family by leaving a percentage rather than a set amount.
<b>BENEFICIARY DESIGNATIONS</b>	Name the Children's Fund as a beneficiary to receive assets.	
Life insurance beneficiary	Make the Children's Fund a primary or secondary beneficiary.	Little expenditure for donor. Income tax deduction. No estate tax when life insurance proceeds are paid to the Children's Fund. Easy to update.
Retirement plan beneficiary	Make a gift by naming the Children's Fund as a remainder beneficiary in your 401(k) or IRA.	If retirement plan assets pass directly from the plan to the Children's Fund, both income and estate taxes are avoided.
<b>LIFE ESTATE GIFT</b>	Transfer the title of a qualified house or farm to the Children's Fund while continuing to live in the residence.	You can live in the home for the remainder of your life. Partial income tax deduction. No capital gains tax. Possible reduced estate tax. Simplified estate settlement.
<b>CHARITABLE GIFT ANNUITIES</b>	Gift is made to the Children's Fund through a contract. The Children's Fund pays the donor a fixed amount each year.	Security of a fixed annual amount of income. A portion of each payment is free from income tax. Capital gains tax is reduced and spread over donor's lifetime. Estate tax savings.
<b>CHARITABLE REMAINDER TRUSTS</b>	These trusts offer a potential income stream from the assets you give to the Children's Fund for up to 20 years.	
Charitable remainder annuity trust	Trust pays the donor a fixed income, which he or she chooses when the trust is created.	Security of fixed annual impact to donor or other beneficiaries. Partial income tax deduction. No capital gains tax when assets are transferred into the trust. Potential estate tax savings.
Charitable remainder unitrust	Trust pays a variable amount each year based on a fixed percentage of the trust asset's fair market value.	Annual income to the donor, with potential increase if the trust value increases. Partial income tax deduction. No capital gains tax when assets are transferred into the trust. Potential estate tax savings.
<b>CHARITABLE LEAD TRUSTS</b>	Trust pays income to the Children's Fund annually for a set period of time, after which the assets revert to donor or heirs.	
Charitable lead annuity trust	Pays a fixed amount annually to the Children's Fund.	More attractive when interest rates are low. Gift is returned at reduced tax cost.
Charitable lead unitrust	Pays the Children's Fund a variable annual amount, which is dependent on the value of the assets in the trust.	If trust assets increase in value, payments to the Children's Fund also increase. Gift is returned at a reduced tax cost.

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# ESTATE PLANNING OPTIONS

	Will planning	Life insurance or beneficiary designation	Life estate gift	Charitable gift annuity	Charitable remainder annuity trust	Charitable remainder unitrust	Charitable lead annuity trust	Charitable lead unitrust
<b>I WANT TO RECEIVE:</b>								
Fixed payments for myself or others.				✓	✓			
Payments that vary with trust value.						✓		
<b>I WANT THE PAYMENTS TO CONTINUE:</b>								
For life.				✓				
For a set number of years.					✓	✓		
<b>I WANT TO MAKE A GIFT:</b>								
During my lifetime.			✓	✓	✓	✓	✓	✓
After my lifetime.	✓	✓						
<b>I WANT TO MAKE A GIFT WITH:</b>								
Cash.	✓	✓		✓	✓	✓	✓	✓
Appreciated securities.	✓	✓		✓	✓	✓	✓	✓
My personal residence.	✓		✓					
Investment real estate.	✓		✓					
<b>I AM LOOKING FOR THE FOLLOWING TAX BENEFITS:</b>								
Income tax deduction for a charitable gift.			✓	✓	✓	✓	✓	✓
Reduced capital gains.				✓	✓	✓	✓	✓
Reduced estate taxes.	✓	✓	✓	✓	✓	✓	✓	✓
Payments to me that may be partially tax-free.				✓	✓	✓		
Tax relief for my heirs/beneficiaries.		✓						✓

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## ESTATE PLAN COMMITMENT FORM

Thank you for including the Kiwanis Children's Fund in your estate plans. We understand that this is one of the most important decisions you will make, and we appreciate your lasting impact. Please complete this form so we can follow your wishes.

**Yes, I/we have made a commitment to the Kiwanis Children's Fund in my/our estate plans.**

\_\_\_\_\_  
Name(s) as you would like to appear on recognition and/or for future publication

\_\_\_\_\_  
Date of birth

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, state or province, country and postal code

\_\_\_\_\_  
Home, business and/or mobile telephone

\_\_\_\_\_  
Email

### The gift will be funded by:

Will or living trust (please include copy of will)

A gift of real estate, securities or other property

Retirement plan

Charitable lead trust

Life insurance policy (please include copy of beneficiary form)

Charitable gift annuity

Other (please specify) \_\_\_\_\_

The gift amount for the Kiwanis Children's Fund is expected to be \_\_\_\_\_ % or US\$ \_\_\_\_\_



**Other contact information:**

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Name of attorney or financial advisor

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Address

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Phone Email

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Name of estate executor or family member(s)

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Address

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Phone Email

**Qualified donors may be recognized for their generosity.**

- You have permission to include my name in recognition.
- I wish to remain anonymous.
- Please do not provide recognition.

With this letter and appropriate supporting documentation, I am/we are expressing the intention of ensuring that the children of the world will continue to be served by Kiwanis International for generations to come.

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Signature Date

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Signature Date

**Notice:** Please consult an independent tax and/or legal representative before making a charitable gift. The details of your commitment remain confidential. However, unless you request anonymity, we may share that you are one of the growing numbers of Kiwanians and friends providing support to the Children’s Fund. You may just inspire someone else.

**PLEASE MAIL OR EMAIL THE COMPLETED FORM TO:**

Kiwanis Children’s Fund  
Attn: Planned Giving Program  
3636 Woodview Trace, Indianapolis, IN 46268

Email: [childrensfund@kiwanis.org](mailto:childrensfund@kiwanis.org)