

With a planned gift to Beloit Meals on Wheels, Inc., you can combine your desire to give to charity with your overall financial, tax, and estate planning goals. Planned giving gives you a special connection with Meals on Wheels. You will help homebound seniors in our community — now and for years to come. Discuss Planned Giving options with your financial advisor, attorney or tax consultant to find the best option for you.

If you name Beloit Meals On Wheels, Inc. in your plans, please use our legal name and federal tax ID.

Legal Name:
Beloit Meals On Wheels, Inc.

Address:
1534 Shore Dr., Beloit, WI

Tax ID#:
39-1375390



Why Give?

Beloit Meals On Wheels, Inc. plays a vital role in helping Beloit homebound seniors receive the nutrition they need to help them remain independent in their homes.

A charitable gift strengthens the community that helps sustain the lives of our elderly neighbors.

Planned gifts can provide financial and tax benefits to you and your family, while helping to secure the future of Beloit Meals On Wheels, Inc.

Thank you for your consideration!

Beloit Meals On Wheels, Inc.
1534 Shore Dr., Beloit, WI
P. 608 362 3683
www.beloitmealsonwheels.org
email: info@beloitmealsonwheels.org



7/31/2023

Beloit

 **MEALS WHEELS** 
on
delivering more than meals

Planned Giving

Leave a legacy of values and vision to Beloit Meals On Wheels by ensuring that the needs of future seniors are met for years to come.

1534 Shore Drive, Beloit, WI 53511
608.362.3683

www.beloitmealsonwheels.org

email: info@beloitmealsonwheels.org

Beloit



Planned Giving

Beloit Meals On Wheels, Inc. has been serving homebound elderly and disabled residents since 1971. Every act of giving is personal and unique and planned giving is an opportunity to secure the future of our program.

As our senior population ages, we face unique challenges within our senior community. Planned giving can provide a meaningful and impactful way to support our critical mission through your estate plan or will.

Your thoughtful foresight, generosity and commitment can have a lasting impact and help ensure support for our most vulnerable seniors for years to come while providing you with additional financial benefits that might include federal income tax and estate tax deductions.

Common types of Planned Gifts are:

- **Estates/Bequests.** A gift through your will or living trust is a simple but significant way to designate Beloit Meals On Wheels, Inc. as a beneficiary of a specific dollar amount, specific asset, or percentage of your estate.
- **Gifts of Retirement Assets, Insurance Policies, Securities.** Designate Beloit Meals On Wheels, Inc. as a beneficiary and make an impact on the life of a Beloit senior.
- **Qualified Charitable Distributions (QCD's).** Allows individuals who are 70½ years old or older to donate to one or more charities directly from a taxable IRA instead of taking their required minimum distributions.
- **Beneficiary Designations.** Many financial accounts, CDs, mutual funds, annuities, IRAs, 401(k) retirement plans, and life insurance policies allow you to make a charitable gift using beneficiary designations.
- **Donor Advised Funds (DAF).** This type of fund allows donors to spread their giving over time to charities you care about. You can recommend Beloit Meals On Wheels, Inc. for a distribution from your fund.
- **Gifts of Highly Appreciated Stock.** When you gift highly appreciated stock, the donor will avoid paying taxes on the capital gains, and the charity receives the full market value of the stock. A substantial benefit for both the donor and the charity.
- **Trusts.** Allows a certain annual amount of money from the donor's trust for a fixed period of time or until the trust runs out.
- **Permanent Endowment.** Establishing a permanent endowment in your name or the name of a loved one is a wonderful way to create a legacy. With this type of fund, a percentage of the earned income is used to carry out the purpose of the endowment while the principal remains intact.
- **Gift Annuities.** You make an irrevocable charitable contribution of cash or marketable securities to Beloit Meals On Wheels, Inc. in exchange for a promise that you will receive a specific amount of partially tax-free income each year for life.