



Asset Based Philanthropy

Quick and easy way to be a Legacy Society member

Many personal assets are designed with a built-in method of transfer or you can add one easily.

You can make a gift to Community Foundation of Tompkins County from your estate without amending your Will or Trust. See below how you can join our Legacy Society with assets not included in one's will. Would you be inclined to transfer any of the following assets?

Asset	Transfer Method	Position relative to Will or Trust
Life Insurance	Beneficiary Designation	Higher Priority
Automobile	Title	Higher Priority
Real Estate	Deed	Higher Priority
IRA	Beneficiary Designation	Higher Priority
Brokerage Account	Account Registration and/or TOD (Transfer on Death)	Higher Priority
401(k), 403(b) etc.	Beneficiary Designation	Higher Priority
DAF Balance	Named Successor Charitable Beneficiary	Higher Priority
LLC Interest	Governing Document	Higher Priority

Also, transferable assets with POD (Payable on Death) or TOD (Transferable on Death) designation: **Checking and Savings Accounts, Security Deposits, Savings Bonds and Certificates of Deposit, all hold higher priority than a will with POD or TOD.**

Would you like to learn more about how easy it is to create a legacy gift to support your favorite charity without amending your Will or a Trust? Did you know that your Will doesn't always control the distribution of your entire estate? I was surprised to learn that! Please contact your professional advisor or:

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