

WE INVITE YOU TO ALIGN  
YOUR LEGACY WITH OURS...

Learn more about the AKA Legacy Society.  
Simply fill out the form, mail it back to us or  
contact Kristen Larson at [klarson@alden.org](mailto:klarson@alden.org).

Yes! I'd like to learn more  
about the Legacy Society.

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

I have already made provisions for  
AKA in my will.\*

\*Thank you for already considering AKA in  
your will and for letting us know in advance.  
Please write your name so that we might be  
aware of your gift.



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ALDEN  
KINDRED  
OF AMERICA  
LEGACY SOCIETY



Stewardship.

Giving.

Entrusting.

Providing for tomorrow.



# HOW ESTATE PLANNING SUPPORTS THE ALDEN KINDRED OF AMERICA MISSION



*Third grade students tour Alden House Historic Site listen to volunteers describe life in the 1600's.*

## YOUR GIFT TO FUTURE GENERATIONS

The Alden Kindred of America Legacy Society's mission is to support those with the desire and capacity to include Alden Kindred in their estate plans. Any proceeds received are reserved for long term goals and are independent from annual operating revenues, allowing AKA long term resources and flexibility to complement the mission of AKA.

## WHAT IS PLANNED GIVING?

Planned giving is a well-recognized method of transferring valuable gifts in the future on a reliable and tax efficient basis to non-profits, schools, churches etc. Planned giving ranges from specific bequests in a will or trust to beneficiary designations in life insurance policies, charitable remainder trusts, transfers from IRA's and various other well recognized mechanisms.

## BENEFITS OF PLANNED GIVING

Planned giving offers the unique opportunity to benefit both the recipient and the donor.

## BEQUESTS

Maintain control of your assets during life, make a gift to the Alden Kindred of America (AKA) at your death.

**HOW IT WORKS:** You designate AKA as the beneficiary of your will, trust or other instrument.

**YOUR BENEFITS:** Estate tax charitable deduction and Life use and ownership of your property



*Stewardship gifts enable today's youth the opportunity to appreciate yesterdays treasures.*

## RETIREMENT PLAN & IRA DESIGNATIONS

Protect the value of your retirement assets and avoid substantial estate tax

**HOW IT WORKS:** You name AKA as a beneficiary of your IRA, 401(k) or other qualified plan. Any assets left in your plan at death pass to AKA.

**YOUR BENEFITS:** You escape both income and estate tax levied on the assets left in your retirement account.



*Honoring our historic treasure with lasting landmarks*

## LIFE INSURANCE & OTHER OPTIONS

Make a "low cost" gift without adversely affecting cash-flow, enjoy tax savings

**HOW IT WORKS:** Make a gift of a paid up insurance policy to the AKA or designate AKA as a beneficiary of a policy. From Charitable Gift Annuities to Charitable Remainder Trusts, there are many ways you can allocate a gift to AKA upon your death.

**YOUR BENEFITS:** Immediate income tax deduction for cash surrender value of policy



*AKA Mission in sharing our heritage and legacy with future generations and members.*