

Benefits of Partnering with Truman Heartland Community Foundation for Your Legacy Gifts



Diversify a gift for multiple causes through one simple process.



Engage future generations in granting decisions.



Create a stream of income that will continue to grow over the long-term for greater impact.



Employ “variance power,” allowing Truman Heartland to identify like causes should those originally named be eliminated over time or should the original need be met.

We invite you to join the Heartland Legacy Society!

As a Heartland Legacy Society member, you’re partnering with 150 donors who share your passion for philanthropy. We invite you to join this caring group of donors today and make plans for future gifts that will benefit charities in our community for good, forever.

For many, these gifts are added to their family fund, while others are used to establish a family fund. We will help create a strategy that fits your goals. You choose whether your gift will be designated for specific charities or to a field of interest area.

Contact Truman Heartland Community Foundation today and share your plans for remembering or establishing your fund through a will, trust, life insurance policy, charitable gift annuity, or other gift.

Thank you for considering a lasting legacy of philanthropy.

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Heartland Legacy Society

Giving For Good. Forever.

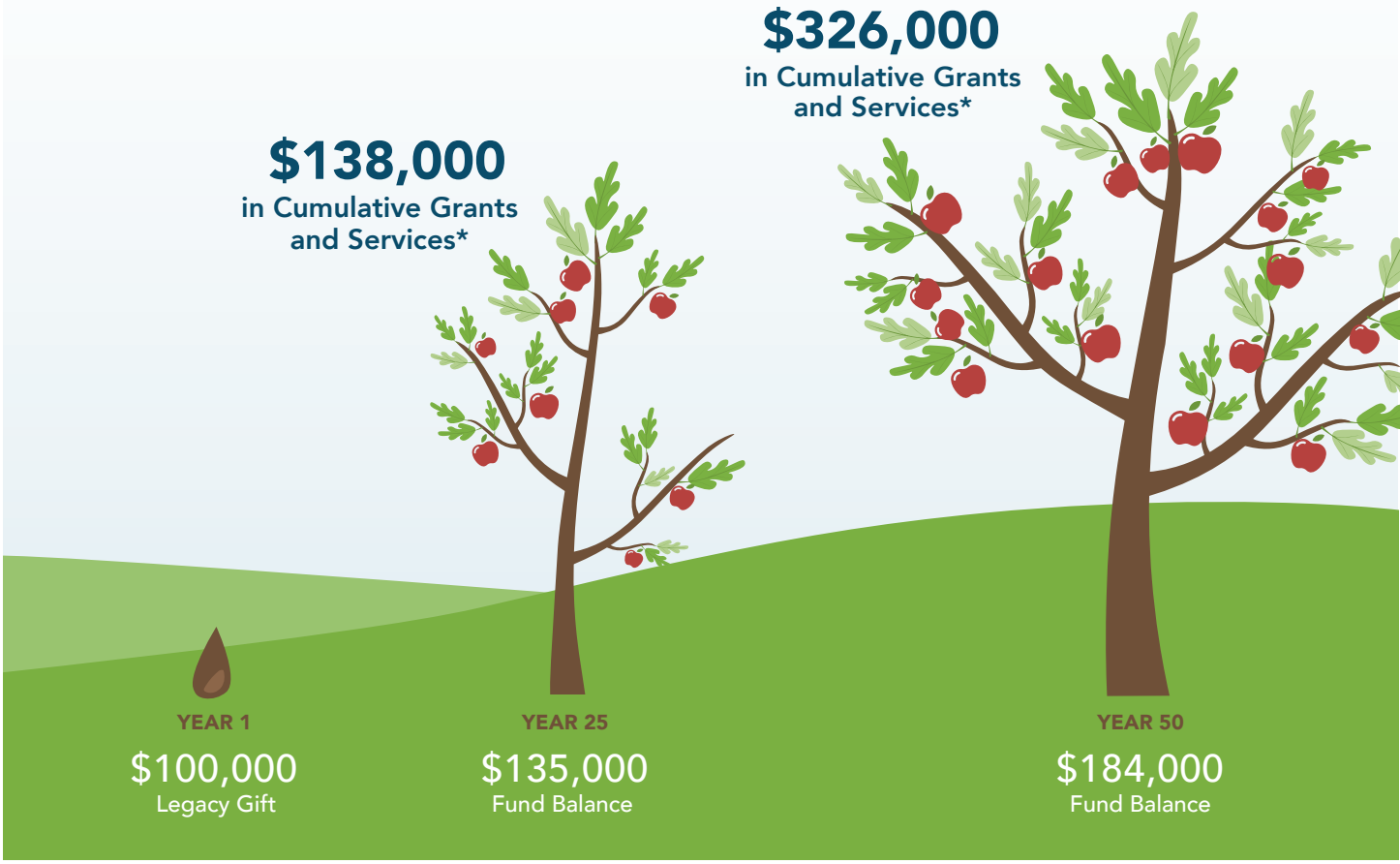


Create a Lasting Impact with Truman Heartland

A trusted leader in charitable giving in the region, Truman Heartland Community Foundation has been facilitating legacy gifts for more than 37 years. We invite you to join the 150 donors who have shared their plans to leave a legacy of giving in our community and joined the Heartland Legacy Society.

Heartland Legacy Society members have several things in common. Like you, they have worked hard, saved wisely and invested well. They understand the power of philanthropy and they know that by partnering with Truman Heartland for their legacy gift, the assets they leave will continue to grow and support meaningful causes in the community.

Your legacy gift has the power to do good works forever.



*Assumes 4.5% annual payout and 6% rate of return net of fees.

Peace of Mind for Your Family and Favorite Causes

Planning a legacy gift allows you to strategically accomplish both financial and charitable objectives. For many, these include preserving the family name, honoring loved ones, providing for heirs, minimizing tax burdens and supporting the community they call home. Plus, legacy gifts to Truman Heartland Community Foundation are exempt from estate taxes, giving you the most charitable dollars to grant to the charities you care about.

A Lasting Legacy

In 2009, James D. Browning gave a **legacy gift** to Truman Heartland to create the J.D. Browning Endowment Fund, benefiting nonprofits serving the Lee's Summit community.

Since 2009, the J.D. Browning Endowment Fund has granted nearly **\$510,000 to nonprofits**.

In the next 25 years, the Browning fund is projected to make cumulative grants of more than **\$1.8 million.***

In the next 50 years, the fund is projected to make cumulative grants of more than **\$3.7 million.***

By partnering with Truman Heartland for his legacy gift, Mr. Browning's passion for philanthropy lives on and will continue to make a positive impact in the Lee's Summit community.

*Assumes 4.5% annual payout and 6% rate of return net of fees.



Who can make a legacy gift?

You. Anyone can give assets including IRAs, securities, real estate, life insurance benefits and cash; often by simply designating Truman Heartland as a beneficiary on their asset's beneficiary form.

What good work can I do with my legacy gift?

You can provide a stream of income that your favorite causes can count on year, after year, after year.

Where can I do the most good?

Truman Heartland Community Foundation is a trusted leader in philanthropy, with more than 37 years of experience. We are knowledgeable about local needs and charities in the community and can help you craft a plan that supports the causes you care about most.

When should I include a gift in my estate plan?

Now. You can include a gift by simply naming Truman Heartland Community Foundation as beneficiary on any of your assets. In addition, anytime you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your professional advisor can provide guidance related to your specific estate, beneficiaries, income goals, taxes and other considerations.

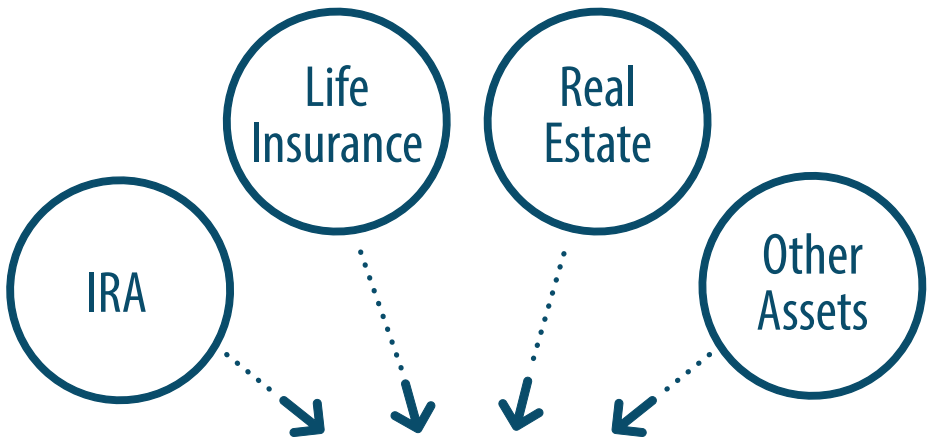
How do I plan a legacy gift?

Contact your professional advisor, talk with us or consult both. We provide confidential philanthropic services to donors and their professional advisors, without pressure or obligation. Planning a legacy gift is simple:

- Include a bequest or planned gift to Truman Heartland in your estate plan and inform us.
- We will establish a fund in your name and for your chosen purpose. Upon your death, your fund will be funded and begin doing good work in your honor.
- We handle all administrative tasks; invest the principal and make grants from the income.

Create Your Legacy Plan with Truman Heartland Community Foundation

Your Legacy Lives On In Perpetuity



YOUR FAMILY FOUNDATION

Designate your favorite charities, scholarships or fields of interest



"The long-term impact is exciting, knowing that our work will be leveraged while we are alive, and then, continue as a reflection of our belief in good stewardship long after we are gone. It's an excellent tool for making an impact – for good – and forever."

Cliff and Diane Jones, Heartland Legacy Society Members

