



Leaving Your Legacy

By Fay Blix, CELA

The California budget crisis has dramatically heightened my awareness of the need to make Alzheimer's Family Services Center self-reliant and immune from the fickle fortunes of legislative politics. I have a dream that together we can make this possible through a strong planned giving program.

Planned giving is simply what it says: a gift that involves planning. It is a process that allows each of us as donors to choose the best strategy to support the future of AFSC while at the same time maximizing the personal financial and spiritual benefits of giving. Planned giving is a gift anyone can afford and does not necessarily cost you anything during your lifetime. It is a process that allows you to consider the future needs of the organization and to have the satisfaction of being a part of brighter tomorrows. As the old proverb sagely suggests, "Plant trees under whose shade you will never sit." It's something friends do for a cause about which they care passionately.

Planned giving is something we do beyond giving to current needs as part of an annual campaign. Gifts for current needs come from our discretionary cash. They are gifts we need to keep on giving because AFSC needs such gifts on a cyclical basis and because they make us feel good about what we can do for an organization we love in the "here and now." It is simply what we do as good citizens in a world hurting from Alzheimer's disease. Planned giving doesn't squelch these regular, genuine expressions of generosity. Planned giving simply allows us to do more. It's about our legacy.

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Legacy is an interesting word. Ambrose Bruce in his Devil's Dictionary defines legacy as "a gift from one who is legging it out of this vale of tears." It is true that legacy can be defined as a "bequest," a gift we give after we die, but I like to think that it involves more than just a transfer of money. A legacy is also being able to pass on a philosophy of life, a cache of precious values, to the next generation. By including charitable giving in your estate plan, you are not only benefitting a charity, but you are also letting your heirs know what you consider important, setting an example of societal stewardship.

Planned giving allows you to pass on that sort of legacy. By doing planned giving with AFSC, we not only help create an enduring future for this organization, but we model for our heirs the joy and importance of giving. When a community of people care about the same thing, we can impact Alzheimer's caring in Orange County for many generations to come.

In the next few issues we will be discussing various methods of planned giving you can use. Some methods assist the wealthy in avoiding capital gains taxes or current income taxes. Others assist in supplementing existing cash flow. Still others avoid probate costs or reduce taxable estates. You can choose the method that suits you best, whether you have a substantial estate or are of modest means. We all want our lives to make a difference. Committing to AFSC's planned giving program is a sure way to enhance your legacy.

To learn more about supporting AFSC through planned gifts or in other ways, please visit our website at www.AFSCenter.org/philanthropy or call Anita Rodriguez-Lambert at (714) 593-9630.



About the Writer

Fay Blix, a certified elder law attorney by the National Elder Law Foundation, operates her own Elder Law Center in Laguna Hills, CA and has been an AFSC dedicated board member for 4 years. Fay has been specializing in elder law since 1989 and has been working with community senior organizations from the beginning. She is fiercely committed to helping others and has been recognized for her efforts by the Alzheimer's Association with the Maureen Reagan Outstanding Advocate Award.