



Your Legacy, Their Future

A Practical Guide to Making a Gift in Your Will



casa de los niños
FOUNDATION



"My hope is that people like us and others in the community will step up and continue to support Casa de los Niños' work. I hope that in the future, they will be able to expand, have a wider footprint, and help more children."

– Don Clark, retired educator and
Casa de los Niños donor

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This material is intended to provide general information, and should not be interpreted as legal or financial advice. Because everyone’s situation is unique, we encourage you to discuss your estate plans with a lawyer or financial advisor.

Casa de los Niños

Over 50 years ago, Sister Kathleen Clark founded Casa de los Niños as a shelter to protect children from neglect and abuse. Since then, we have consistently grown and evolved our services to best meet the current needs of our community.

Today, we keep children safe and cared for by focusing on three priorities: Prevention, through parenting classes, in-home nursing visits for new parents, and the Kelly Early Education Center; Intervention, through supervised visitation and foster care and adoption support services; and Treatment, through behavioral and mental health services offered in school-based programs and on our campus.



Casa de los Niños Foundation

Founded in 1988, Casa de los Niños Foundation ensures that the vital work of Casa de los Niños endures for generations, by investing and growing legacy gifts that support the organization's ongoing mission of promoting child well-being and family stability in our community.



*Together, we are building safer futures for children
and families in Pima County.*

Your Legacy Matters

Your Compassion Today Will Change Childhoods Tomorrow

Planning a legacy gift is an incredibly personal process. **It's also fiercely hopeful.**

It's an opportunity for you to reflect upon your life, your personal values, and what you hold dear, and then ask, *"How can I leave this world a better place?"*

As a Casa de los Niños supporter, you already know that safe childhoods lead to strong futures. The work we do here every single day is built on optimism, and the knowledge that taking action today means a better tomorrow.

And that same spirit applies to you today, as you consider your legacy plans.

As you review this information, we encourage you to think about your values and priorities, and how you want to be remembered. Once you've ensured your loved ones are taken care of, we hope that you'll also include a gift to Casa de los Niños Foundation in your will to protect future generations of children who need our help.

THANK YOU for taking the time to consider this powerful way to leave your mark on our community. We are grateful for your optimism and thoughtfulness.

Yours for a better tomorrow,



Nora Navarro-Hernández

Chief Executive Officer
Casa de los Niños



Cicely Parseghian

President
Casa de los Niños
Board of Directors



Dee-Dee Samet

President
Casa de los Niños Foundation
Board of Directors

Creating Your Legacy

How to Make a Gift in Your Will



Your will is a legal document that expresses your intentions for your property, assets, and your final wishes. A gift in your will (formally known as a bequest) allows you to remember your loved ones as well as the causes close to your heart.

Many people are surprised to learn that you can ensure your family and friends are taken care of and make a gift in your will to Casa de los Niños Foundation. In fact, because of the tax advantages offered by charitable bequests and trusts, they may allow your estate to share even more with your loved ones.

It's important to prepare your will with the guidance of both a lawyer and a financial advisor. Including a charitable gift or trust adds a few minutes to those conversations and just a few sentences to your will. We also strongly encourage sharing the details of your will with your closest family or loved ones so that they are aware of your wishes for your personal legacy.



"With six children between us, and eight grandkids so far, my wife Jennifer and I care deeply about setting the next generation up for success. Including Casa de los Niños in our estate plans is a great way to make a future impact that aligns perfectly with our values. Every legacy gift has the power to change lives!"

*– Ray Magnuson, Casa de los Niños Foundation Board Member
and future legacy donor*

Common Types of Charitable Bequests

Specific Gift

A specific gift is a fixed dollar amount, or a particular item or asset, to be distributed to Casa de los Niños Foundation by your estate.

Sample wording: “I’d like to give to Casa de los Niños Foundation, a charitable organization (Tax ID 86-0609655) located at 1120 N. 5th Avenue, Tucson, AZ, the sum of \$ _____ [or name of asset] for its general purposes.”

Residual Gift

A residual gift can either be the balance of the assets that remain after all debts, bills, and taxes have been paid by your estate, or a specific percentage of the remainder.

Sample wording: “I’d like to give to Casa de los Niños Foundation, a charitable organization (Tax ID 86-0609655) located at 1120 N. 5th Avenue, Tucson, AZ, the sum of \$ _____ [or name of asset] for its general purposes.”

Contingent Gift

A contingent gift comes into effect only if the designated primary beneficiaries (usually children or family members) are unable to accept the estate gift.

Sample wording: “If my primary beneficiary/ies [name of beneficiary/ies] does/do not survive me, then I give [the sum of \$X/a percentage of my estate/a specific asset] to Casa de los Niños Foundation, a charitable organization (Tax ID 86-0609655) located at 1120 N. 5th Avenue Tucson, AZ 85705, for its general purposes.”

To ensure your legacy intentions can be realized, please include our full legal name (Casa de los Niños Foundation), Tax ID 86-0609655, and address (1120 N. 5th Avenue Tucson, AZ 85705) in your will.

Building a Safer Future

Legacy Gifts Help Families, For Generations

Rose M. and James L. Kelly

Their Lasting Gift Builds Stronger Beginnings

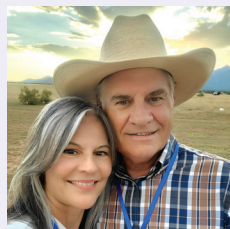


Rose and James Kelly were lifelong Arizonans who cared deeply about their community. Today, their legacy lives on here in Tucson, at the **Kelly Early Education Center**.

In 2018, Casa de los Niños became the beneficiary of a generous gift from the couple's estate that made this new, welcoming space for infants and children possible. Since then, we've been able to provide vital care and family support to hundreds of children at the Kelly Center. We are so thankful to Rose and James Kelly for supporting families in Tucson in such a meaningful way, for many years to come.

Ray and Jennifer Magnuson

Planning Today for Tucson's Brighter Future



"Casa de los Niños is a powerful voice for children and families. That's why my wife Jennifer and I have included Casa de los Niños in our wills. We want to be part of creating a brighter future for families.

"Setting our gift up couldn't have been easier. Personally, I like to think of our estate as pieces of pie—everyone can have a slice, including our children, grandchildren, and the causes we care about. I'm comforted knowing that one of the final things I will do with my money is make a positive difference in Tucson, a place I love with all my heart."

– **Ray Magnuson**, Casa de los Niños Foundation Board Member and future legacy donor

"Everyone at Casa de los Niños has been so supportive of my family. I feel safe. I feel supported, and I can find all the information and help I need. I'm so blessed that we found this place and have a chance to get back to ourselves."

– *Patricia, program participant* 

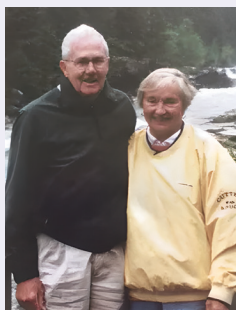
Parenting Education & Outreach

Your Legacy Can Nurture Families

When you make a gift in your will, you'll be supporting a wide range of programs that help children. One example is our parenting classes, offered free of charge in both English and Spanish. This vital program lays the foundation for a family life that provides the structure, laughter, and play kids need to build their self-esteem. It empowers parents to model open, safe communication, and can help break harmful family cycles.

Marjorie and Loyal Moore

An Enduring Act of Kindness



Marjorie and Loyal Moore were married for 64 years, and had two daughters and five grandchildren. They often chatted with Casa de los Niños team members about what was happening at the organization, and how they might be able to help.

When Marjorie passed away in 2016, she left a generous bequest to support the children and families that depend on Casa de los Niños. Loyal loved the idea of using Marjorie's gift to bring our programs under one roof, to make it easier for families to access services. Now, the **Marjorie H. Moore Building** houses our Foster Care, Nurse-Family Partnership, Parents as Teachers, and Community Outreach and Education programs.

Loyal got to see his wife's legacy support a community they both held dear. When he passed away in 2022, he left an additional gift to Casa de los Niños. We are grateful for the couple's years of caring support, and for the tremendous difference they continue to make today.

Foster Care & Adoption Support Services

Helping Families Navigate a Complex Process

For families like Dania and Bobby, whose grandson Jayden was born addicted and needed heart surgery at only 8 weeks old, Casa de los Niños helped them throughout the process of Kinship Adoption to give Jayden the stable life he deserves.

"Our caseworker Alicia came to our home and walked us through everything! All the steps involved in becoming Jayden's foster parents, with the ultimate goal of Kinship Adoption. She treated us with kindness and care," Dania shares. "I don't know what we would have done without her."

Jayden's adoption was recently finalized, and the two-year-old is happy, active, and surrounded by love. Dania and Bobby couldn't be more thankful. **This is just one example of how your legacy gift to Casa de los Niños will share compassion and practical support with children and families in Pima County.**

Frequently Asked Questions

Why is it important to have a will?

Creating a will is a powerful and caring act. It provides guidance to your family and loved ones during a challenging time, and ensures your wishes will be carried out, including taking care of your loved ones and charitable gifts.

Are there financial benefits to leaving a gift to Casa de los Niños Foundation in my will?

Yes! Making a gift in your will can minimize the tax payable by your estate. This in turn can also increase the amount you can leave to your loved ones.

How do I include a gift to Casa de los Niños Foundation in my will?

We recommend the guidance of a lawyer and financial advisor when preparing your will. We've outlined some common types of gifts in wills, along with sample wording, in the previous pages that you can share with your advisors.

Can I designate my gift to a specific area or program at Casa de los Niños?

An unrestricted gift, directed to our areas of greatest need, will ensure your legacy gift can have the maximum impact on future generations of children and families, by allowing us to be flexible and address new, emerging challenges. If a specific program or service is especially meaningful to you, we want to honor your wishes. We encourage you to use the enclosed Gift Intention Form or to speak with us about how to designate your gift.

How can I make a legacy gift to Casa de los Niños Foundation if I already have a will?

If you already have a will, you can update or change it at any time. As your assets and priorities can change over time, you'll want to periodically review your will and estate plans with a lawyer or financial advisor, and you can add a gift at that time. If adding a bequest is the only change, you can add a codicil to include your bequest in your estate plans instead of rewriting your existing will.

Are there different kinds of gifts I can make in my will?

Yes! Although bequests are the most common type of gift people include in their estate plans, we have outlined some other giving options on the next page. We recommend speaking with a legal or financial advisor to ensure you choose the type of gift that meets your needs and maximizes your tax benefits, either today or for your estate.

Additional Legacy Giving Options

Consider These Alternate Gift Choices

A gift in your will is the most common way to include a donation to Casa de los Niños Foundation in your estate plans. But there are many other types of legacy gifts to consider, including:



Gift of Life Insurance: You can name Casa de los Niños Foundation as the owner and beneficiary of a new or existing insurance policy. The premiums you pay are considered charitable donations, and the policy will be paid to Casa de los Niños Foundation.



Gift of Retirement Assets: Naming Casa de los Niños Foundation as the primary or secondary (contingent) beneficiary of your retirement funds (including IRAs, Roth IRAs, 401(k)s, 403(b)s, and other pension plans) may offset taxes payable by your estate.



Gift of Property: You can donate real estate, works of art, jewelery, or other property to Casa de los Niños Foundation through your will.



Gift of Stocks and Securities: By donating stocks, bonds and mutual funds in your will, you may offset capital gains taxes for your estate.



Charitable Gift Annuities (CGA): Establishing a charitable gift annuity to benefit Casa de los Niños Foundation provides you with a fixed source of income for life, and can offer a range of tax benefits.



Donor Advised Fund (DAF): You can make Casa de los Niños Foundation the beneficiary of your entire DAF account, or a percentage of the fund.



Qualified Charitable Distribution (QCD): A qualified charitable distribution (QCD) lets individuals age 70½ or older donate directly from a taxable IRA to Casa de los Niños Foundation (up to \$108,000 per year), avoiding taxes on distributions.



Why Become a Legacy Donor?

A Caring Act with Tremendous Impact

Including a gift to Casa de los Niños Foundation in your estate plans is a powerful and caring act. It's a way of showing your loved ones, your community, and future generations your personal commitment to a safer, healthier community.

By speaking to your advisors and choosing the type of legacy gift that works best for your personal circumstances and wishes, your estate can benefit from significant financial advantages, such as reduced or even eliminated estate taxes.

A gift in your will is revocable, meaning it can be modified if your financial circumstances change, and it doesn't cost you anything during your lifetime.

Pillars of Hope Legacy Giving Circle

The *Pillars of Hope Legacy Giving Circle* is a growing group of supporters who have made a gift in their will, or other legacy donation, to Casa de los Niños Foundation.

It would be an honor for us to recognize your legacy commitment by welcoming you to the *Pillars of Hope Legacy Giving Circle*. As a member, you'll receive exclusive invitations to special events including The GratiTour, a guided tour of our facility with the senior leadership team, and a listing in our annual Gratitude Report.

Please use the enclosed **Gift Intention Form** so that we can include you in the *Pillars of Hope Legacy Giving Circle*. If you wish your legacy gift to be anonymous to the public, or wish to keep the amount of your gift private, notifying us once you've made your estate plans helps us ensure your privacy will be protected.

Our Promise to You

Your legacy gift is a significant and meaningful commitment, and Casa de los Niños is just as committed to your experience as a donor. This is our promise to you:

We respect your privacy, and recognize that your will is a personal document. We promise to keep all of our conversations confidential.

We would like to know if you have made a gift to Casa de los Niños Foundation in your will, not only to help in our planning, but also to recognize your generosity during your lifetime. **We respect your right to choose to share that information with us, or not.**

We understand and agree that **your loved ones come first.**

We want to ensure your wishes are honored, and that your legacy gift is directed to the area of our work that is the most meaningful to you. **We encourage you to contact us to learn more about our programs and services.**

We will provide you and your loved ones with special opportunities to recognize your generosity, in keeping with any preferences you have shared with us.

We are proud of our history, of our proven track record, our strong leadership and vision for the future. **We are profoundly grateful for your trust and confidence.**

We will strive to respond to your questions or concerns immediately. You can contact us by phone at (520) 624-5600 or giftplanning@casadelosninos.org to discuss your legacy giving plans at any time.

What Comes Next?

Make Your Legacy Plans a Reality

Step 1: Gather information

Write down your thoughts, questions and priorities, then reach out to us to discuss them. We'd be delighted to support you while you explore your legacy giving options, and our conversations will always be confidential with no obligations.

Step 2: Create or update your will

Contact a lawyer that specializes in estate planning to draw up your will, or add a codicil to your existing will. You might also choose to explore electronic will providers online. It's also a good idea to inform your loved ones of your plans and decisions.

Step 3: Keep us informed

Please let us know that you've chosen to leave a gift in your will to Casa de los Niños Foundation. Sharing your plans allows us to convey our gratitude to you, recognize your generosity in the ways you prefer, and helps us plan more effectively for the future.

You can use the enclosed Gift Intention Form, email us at giftplanning@casadelosninos.org, or call us at **(520) 624-5600**.

*Thank you
for creating a legacy that will keep children and families
safe and supported, for generations to come.*



"Casa de los Niños' services may change and evolve, but a child's need for protection and security in a loving family that is able to provide stability, is a constant that will never change. That is why Casa de los Niños will continue to be an anchor for present and future generations of our children and families."

- Jeanne Landdeck-Sisco, Former CEO and current Casa de los Ninos Foundation Board Member



casa de los niños
FOUNDATION

1120 N. 5th Avenue, Tucson, AZ 85705

Website: casadelosninos.org/legacy

Email: giftplanning@casadelosninos.org

Telephone: (520) 624-5600

Founded in 1988, Casa de los Niños Foundation ensures that the vital work of Casa de los Niños endures for generations, by investing and growing legacy gifts that support the organization's ongoing mission of promoting child well-being and family stability in our community.

Your Legacy In Action

Gift Intention Form

Dear Cherished Supporter,

Thank you for considering a legacy donation to Casa de los Niños Foundation. Your future gift has the power to create a stronger tomorrow here in Pima County.

By keeping us informed of your estate plans, you're allowing us to plan more effectively and to ensure your gift intentions and aspirations are realized. This form is not legally binding and can be changed at your discretion at any time. Rest assured that anything you choose to share with us will remain confidential.

Please return your completed form to:

Casa de los Niños Foundation
1120 N. 5th Avenue
Tucson, AZ 85705

You may also scan and email this form to giftplanning@casadelosninos.org.

Again, thank you for taking the time to consider this powerful way to leave your mark on our community. We are grateful for your optimism and thoughtfulness.

Donor Name: _____ Spouse Name: (if applicable) _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Age: ☐ 80+ years ☐ 70-79 years ☐ 60-69 years ☐ 50-59 years ☐ 40-49 years ☐ under 40 years

Legacy Gift Details:

What inspired you to make a legacy gift to Casa de los Niños Foundation?

Please include any other details you may wish to share, such as type of gift or asset, percentage vs specific amount, unrestricted vs. designated purpose, estimated amount, etc. (*optional*)

Further Discussion:

☐ Please have a member of the Development team call me/us to discuss the details of my/our gift at:

Telephone: _____

Recognition:

By sharing this form with us, you will automatically be included in the *Pillars of Hope* Legacy Giving Circle, receive special invitations, and be recognized in our Gratitude Report and other channels.

☐ Please include my/our name(s) in recognition materials and other public channels.

Display name(s) as: _____

☐ I/we prefer to remain anonymous. Please do not list my/our names publicly.

I/we understand that this Legacy Gift Intention Form is not legally binding, and can be changed by me/us at any time. If my/our legacy giving plans change, I/we will inform Casa de los Niños Foundation.

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

If you have any questions about this form or your legacy plans, please contact Casa de los Niños Foundation at (520) 624-5600 or giftplanning@casadelosninos.org.

Thank you for your tremendous support. 

Website: casadelosninos.org/legacy

Email: giftplanning@casadelosninos.org

Telephone: (520) 624-5600

Casa de los Niños Foundation is a registered 501(c)(3). Charity Tax ID: 86-0609655



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