**THE ADVOCATES CIRCLE**

***Leave a Legacy. Help Future Generations of Foster Children.***

In 2013, *The Advocates Circle* was established at Voices for Children to recognize and honor those who have provided for VFC in their estate plans. To date, 38 San Diego families have joined this group. Members of *The Advocates Circle* receive recognition in publications and special acknowledgement for helping future generations of foster children in San Diego County.

We invite our CASAs to consider joining *The Advocates Circle*! You just need to inform VFC that the organization is included in your estate. No documentation is required. Contact Anne Farrell at [AnneF@speakupnow.org](mailto:AnneF@speakupnow.org), or (858) 598-2246 for more information or to let her know that you have already included VFC in your plans.

By joining the Advocates Circle, your foresight and planning help ensure that future generations will benefit from the values that are most important to you. In creating a legacy at Voices for Children, you can also reduce your current or future tax burden, increase current income, and meet your family’s own personal and financial objectives. Making a planned gift does not require great wealth, and Voices for Children will work with you and your tax or estate planner to help determine which type of gift is best.

**FAQ\*: Planned Giving**

*\* The information we provide is general in nature and not intended to be tax or legal advice applying to your specific situation. You should seek information from a qualified professional advisor when considering a planned gift of any kind.*

**I'm not wealthy. How could I have an estate large enough to make a charitable gift?**Most people are surprised at the total value of their assets when they take into account their home, retirement plans, IRAs, personal property, and investments. After providing for family and friends, it is often possible to plan charitable gifts as well, and they can benefit your family’s tax situation.

**I don't know much about planned giving. How can Voices for Children be of help to me?**A member of Voices for Children's philanthropy team would be happy to discuss your questions with you, with no obligation on your part to make a gift. We can provide you with general information, which you can then discuss with your financial and/or legal advisor. Voices for Children will never pressure you or share your information with third parties.

**I may wish to remain anonymous. How would notifying Voices for Children be of value to me?**Knowing your intentions will help Voices for Children better plan for the future, but we will honor any donor’s wish to remain anonymous in public listings. In addition, we feel strongly about expressing our gratitude to you for your gift and would be honored to welcome you into *The Advocates Circle* —which recognizes supporters who have included VFC in their estate plans. Members are included in donor events and recognized on the Donor Wall and in publications if you wish. By allowing your planned gift to be publicized, you might even inspire others to make the same commitment!

**What information do I need to know about Voices for Children when making a planned gift?**

Full legal name:  Voices for Children, Inc.   
Federal Tax I.D. Number:  95-3786047  
Main Office Address:  2851 Meadow Lark Drive, San Diego, CA 92123-2709

**How can I make a gift to Voices for Children through my existing will or trust?**It's an easy process. Your attorney can simply add a “codicil” to your current will or trust, using simple bequest language that allocates a fixed amount, a percentage of your estate, or the remainder of your estate to Voices for Children. Suggested wording**: “***I give, devise and bequeath to Voices for Children, Inc., a non-profit corporation in the state of California, the sum of $\_\_\_\_\_ (or \_\_\_\_\_% of my estate) (or all of the residuary of my estate) to be used for general purposes.”*

Always consult with your attorney or tax consultant; he or she can also discuss other ways you could include Voices for Children in your estate, such as retirement plans, life insurance, or charitable remainder trusts or annuities.

**Not ready for a Planned Gift? Make a gift now for immediate tax benefits.**

If a planned gift is not right for you and your family at this time, then consider making an outright gift of cash or appreciated stock. Voices for Children welcomes gifts of stocks, bonds, and shares of mutual funds. By donating appreciated stocks directly to VFC, you can avoid the capital gains tax that would be incurred if you sold the securities and donors are entitled to a charitable income tax deduction for the full fair-market value of the stock for the year the gift is made. The fair-market value is determined by the mean of the high and low sales prices on the date the stock is received by Voices for Children.

The following are instructions for transferring stock to Voices for Children’s account. Please have your broker contact Staci Hairgrove at Dowling & Yahnke to let her know of your plans for a stock transfer.

Staci Hairgrove, Client Service Supervisor

Dowling & Yahnke, LLC

12340 El Camino Real, Suite 450

San Diego, California 92130

[Staci.Hairgrove@dywealth.com](mailto:Staci.Hairgrove@dywealth.com)

Tel: (858) 509-9500 x147; Fax: (858) 509-9520

[www.dywealth.com](http://www.dywealth.com)

Transfer instructions for DTC-eligible securities are as follows:

* Charles Schwab & Co.
* DTC 0164, code 40
* For the account of: Voices for Children
* Schwab account #: 9099-1470

Voices for Children is a 501(c)(3) tax-exempt organization; the tax I.D. # is 95-3786047.

If possible, please inform Voices for Children so that we may track your gift safely and inform our agent to sell the stock immediately, which is the policy of the VFC Board of Directors. You can email Anne Farrell, Chief Strategy Officer, at [AnneF@speakupnow.org](mailto:AnneF@speakupnow.org); Rebecca Rader, Senior VP of Philanthropy at [RebeccaRa@speakupnow.org](mailto:RebeccaRa@speakupnow.org); or James Scoffin, CFO, at [JamesS@speakupnow.org](mailto:JamesS@speakupnow.org).

Regardless of how you support Voices for Children, your gift will change the lives of foster children who will benefit from having a Court Appointed Special Advocate—a CASA like you—to speak up for them in Court, in school, and in the community. Your gift will be a legacy of hope for innocent children who deserve a chance at a safe and happy childhood.

**Contact Us**

For a confidential discussion regarding gift planning or any contribution to VFC, please contact:

Anne Farrell, Chief Strategy Officer

Voices for Children

2851 Meadow Lark Drive

San Diego, CA 92123-2709

[AnneF@speakupnow.org](mailto:AnneF@speakupnow.org)

(858) 598-2246