

# Estate and Planned Giving



Empowering People.  
Strengthening Communities.



**Ascentria**  
CARE ALLIANCE  
Empowering People. Strengthening Communities.

## Estate and Planned Giving

Through an estate or planned gift, you can help ensure a vital future for Ascentria Care Alliance and those we are privileged to serve. There are several ways to support our clients and programs through your planning:

**Will and Living Trust Bequests** – Include Ascentria Care Alliance in your will or living trust. You can bequeath a specific dollar amount or a percentage of your estate. Your bequest is deductible for federal estate tax purposes to the full extent allowed by law. Suggested language may include:

*“I hereby give, devise and bequeath to Ascentria Care Alliance, a non-profit public benefit corporation located at 14 East Worcester Street, Suite 300, Worcester, MA 01604, \_\_\_\_\_ percent of my estate (or, the sum of \$\_\_\_\_\_).”*

**Life Insurance Policies and IRAs** – Name Ascentria Care Alliance as the beneficiary of an IRA or insurance policy. IRAs usually require some form of tax payment when funds are distributed, but by naming Ascentria Care Alliance as the beneficiary, taxes are avoided since we are a non-profit organization.

**Charitable Remainder Trusts** – Establish a charitable remainder trust and provide yourself, or your designated beneficiaries, with an annual income usually for life, with the remainder of the donated assets benefiting Ascentria Care Alliance at maturity. Charitable trusts offer the donor potential gift and estate tax benefits.

## Questions about estate planning?

Please allow us to answer any questions and/or acknowledge your generous intentions by contacting:

Ascentria Care Alliance  
Development Office  
14 East Worcester Street, Suite 300  
Worcester, MA 01604  
774.243.3900  
ascentria.org



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Formerly Lutheran Social Services of New England