

Sons of Italy Foundation Legacy Gift Form

Name: _____ City: _____ State: _____ ZIP: _____
Address: _____
Phone type & number: (home / business / mobile) _____
Alternate phone type & number: (home / business / mobile) _____
Email: _____ OSIA member since (if applicable): _____

- ☐ I have already included the Sons of Italy Foundation in my estate plans.
☐ I plan to include the Sons of Italy Foundation in my estate plans. Please send me: ☐ sample wording ☐ sample codicil
☐ Please contact me to discuss legacy giving to the Sons of Italy Foundation.
☐ I will call you to discuss legacy giving to the Sons of Italy Foundation.

Please return to the Sons of Italy Foundation: 219 E Street NE, Washington, DC 20002 | sif@osia.org



The Sons of Italy Foundation
219 E Street, NE
Washington, DC 20002

202.547.2900 | 202.547.0121 (fax)
sif@osia.org | www.osia.org/sif



*The greatest use
of life is to spend it
for something
that will outlast it.*

- William James



*Planting the Seeds
of the Future.*

Building your Legacy

with

*The Sons of Italy
Foundation*

Why Choose the SIF for a Legacy Gift?

The Sons of Italy Foundation (SIF) is committed to improving the lives of Italian-Americans, and others in need, through educational opportunities, support of medical research, contributions to emergency/disaster relief, and cultural enrichment, primarily the preservation and promotion of Italian and Italian-American culture and heritage.

Deeply rooted in the fabric of the Italian-American community, the SIF together with its parent organization, the Order Sons of Italy in America, have a collective history that dates to 1905 and financial support that comes in at an impressive \$126 million. Their history of giving includes more than \$57 million for scholarships, \$12.5 million for March of Dimes, \$2 million for the Alzheimer's Association, and countless other organizations and projects that reinforce the SIF's mission.

The Sons of Italy does so much good, for so many people. Support from the community, our members, friends, and others equally committed to making a difference is crucial to the SIF's success. Gifts made today are important to carry on our current work. Gifts made as part of planned giving for deferred or long-term use – legacy gifts – are ones that help secure a limitless future for the Foundation.

Bequests: A Legacy Gift

The simplest type of legacy gift is a bequest, a gift made through a will or trust.

A bequest is revocable and can be written into an initial will or trust, or added later with a codicil. A gift through bequest may be made for a specific amount, a percentage of your estate, or the remainder of your estate once all other obligations have been met.

You have the power, when naming the Sons of Italy Foundation the beneficiary of a bequest, to direct how your gift will be used. To maximize its impact, you may choose to make the bequest an unrestricted gift, so the Foundation may put it to use when and where it

is most needed. Likewise, you may designate your gift to a specific SIF purpose that is dear to your heart, for example scholarships or cultural enrichment.

Bequest Legacy Gift Donor Benefits

Supporters who choose to make a charitable gift through a bequest receive multiple benefits.

Perhaps you are not able to make as large a gift as you would like in your lifetime. Establishing a legacy gift today enables you to make a substantial contribution to the SIF that doesn't have an impact on your current financial situation...but has a significant impact on the SIF when it receives the gift.

Additionally, bequests often require minimal resources to establish and may provide a tax benefit to your heirs by reducing your taxable estate.*

Perhaps most important, when you give a gift through bequest, you are creating a lasting legacy that will endure

long after your lifetime; it helps sustain the Sons of Italy Foundation's philanthropic work far into the future.

*As with any important financial/legal decision, please consult your advisors prior to establishing a legacy gift to determine what options are available and best suited to your needs, as well as the financial implications on your estate and heirs.

What a Legacy Gift Means to the SIF

When you include the Sons of Italy Foundation in your will or trust, you are making a commitment to the future of the SIF. Your legacy gift helps the SIF set a vision for the future and plan accordingly. **Remember, even a modest gift helps and demonstrates your belief in the Sons of Italy mission.**

Your legacy gift helps in another, sometimes unexpected, way also. It can inspire others to consider making a similar gift, establishing their legacy of sustaining the future of the Sons of Italy Foundation.

Getting Started

There are a few steps you may consider taking to establish a legacy gift to the Sons of Italy Foundation.

- **Consult your advisors:** As with any major financial decision, it is recommended you consult with your financial and legal advisors to discuss what options are best for you and what impact they will have on you, your estate and your heirs.
- **Determine gift use:** When you decide to name the SIF in your will or trust, remember to determine how you would like your gift used. To maximize its impact, you may choose to make the bequest an unrestricted gift, so the SIF may put it to use when and where it is needed most.
- **Include the gift in original will/trust or codicil:** Consult your advisors about including language designating a gift for the SIF in your will or trust. If you already have a will or trust but want to make a legacy gift to the SIF, that can

be done with a codicil, or amendment. Please contact us if you would like sample wording for legacy gift inclusion in a will/trust or a codicil.

- **Notify us of your legacy gift:** We are grateful you have made a commitment to support the future of the SIF in this profound way. We kindly ask that you notify us, if you wish, of your commitment. Simply check the box on the attached form, noting you have included the SIF or plan to include the SIF in your estate plans, and return to us. We will not ask you the amount of your legacy gift, however you may share it if you wish.
- **For more information:** Please call 202.547.2900 and ask for the SIF Legacy Giving Department or email us at sif@osia.org.