

PLANNED GIVING



TIDES FOUNDATION



**H**ow do you plan to make a difference in the world, today—and tomorrow? When making a gift for the future, how can you ensure your philanthropic wishes will be carried out?

Planned giving with Tides Foundation means that your vision will endure and that the seeds you have planted today will grow tomorrow.

When considering planned giving, you want to focus on what is truly important. With Tides Foundation, you can rest assured that:

- ◆ Your original intent will be honored.
- ◆ Your values and priorities will be respected.
- ◆ Your gift will be used effectively to support issues important to you far into the future.

At the same time, you need to know that your planned gift will give you the most security, flexibility and benefits possible.

At Tides Foundation, we can help you achieve both of these goals. By working with your estate or tax planning professional advisor, you can craft a giving plan through Tides



that can benefit your family while supporting issues in which you believe for years to come.

Your values are the most important legacy you can leave. With Tides Foundation, you can leave that legacy in

reliable and experienced hands.

For 30 years, Tides has been the leader in social change philanthropy. You can count on our experienced and principled professionals to carry out your vision today, and tomorrow.

*“I’ve worked with Tides for 20 years. Through my Donor Advised Fund at Tides Foundation, I’ve been able to support groups fighting discrimination—here and abroad. I agree with their philosophy of giving and the social values they represent. And I know the people. So it only makes sense to plan for my future giving with Tides as well.”*

— TIDES DONOR



RED MAPLE  
(*Acer rubrum*)

*“You don’t have to be rich to own a house. What we’ve done is arranged a future sale of our house that will benefit one of the issues that my family cares deeply about—land use for indigenous people in our region. We’ve set it up as a revocable gift just in case. But we have a commitment to land rights and this seemed like a perfect way to demonstrate that commitment in the long term. We don’t have a fund at Tides right now. But our financial advisors worked very closely with the staff at Tides to make this work. The whole process was fantastic.”*

— TIDES DONOR

**F**or 30 years, Tides Foundation has worked with donors like you to support such fundamental core values as social justice, shared economic opportunity, a robust democratic process, a fair and equitable society,

and sustainable environment. We have seen these and other ideas grow from acorns to action.

Because of this shared vision, donors like you have contributed more than \$600 million through Tides Foundation to vital and effective nonprofits working to make our community, our nation, and our world a better place.

We share the belief that your reach should not be constrained by geographic limitations. And your impact should be defined by your vision. Whether it is a field of interest fund, global grantmaking, multi-year grants, scholarship programs or other funding strategies, Tides will make sure your gift will be deployed as faithfully

and effectively as possible in pursuit of your philanthropic vision and goals.

At Tides Foundation, we have built a reputation as a



trustworthy institution where donors can conduct their philanthropy with privacy and professionalism. We will work with you and your financial advisors to ensure that your specific goals for the greater good are inte-

grated with your estate plans, and that your family and the larger community enjoy the greatest benefits possible.

At Tides, your vision and your values can grow with time, and endure.



SUGAR PINE  
*(Pinus lambertiana)*

*“Taking care of my family is my first priority. But my philanthropy is also very important to me. Working with my own advisors and Tides Foundation, I feel confident that both of these goals will be met with our Planned Giving Program.”*

— TIDES DONOR

**B**y making a planned gift now, you and your heirs can begin reaping the benefits today. We offer a variety of Planned Giving Programs and can accept a wide variety of gifts. You can be sure that you will enjoy the financial advantages, freedom of choice and commitment to values that come with working with Tides Foundation.

**FINANCIAL ADVANTAGES:**

◆ *Significant Tax Advantages*

All planned giving options can, depending on your situation, provide you with substantial tax advantages with the possibility of significantly reducing some taxes.

◆ *Income for You and Your Family*

You can provide you or your heirs with significant variable or fixed income, perhaps at a higher rate than you are currently earning. That could mean income for life for you, your family or a beneficiary.



**FREEDOM OF CHOICE**

◆ *Complete Control*

Some planned gifts allow you to change your mind at any time, as you retain complete control and access to all your assets during your lifetime.

◆ *Flexibility of Use*

If you have a Donor Advised Fund with Tides, you can make immediate use of your gift for philanthropic purposes today.

◆ *Ways to Give*

Tides Foundation accepts a wide variety of gifts to establish your Planned Giving Program. We will work closely with you and your financial advisors.

**COMMITMENT TO VALUES**

◆ *Faithful to Your Vision and Intent*

You can be sure that Tides Foundation will be an actively engaged steward not only of your resources, but of your philanthropic vision.

◆ *30 Years of Social Change*

Tides Foundation is a public charity driven by our vision of expanded human rights, equal opportunity, a sustainable environment and our commitment to helping our donors achieve their philanthropic goals.

**GIFTS ACCEPTED:**

- ◆ Cash
- ◆ Real estate
- ◆ Life insurance
- ◆ Retirement plan beneficiary designations
- ◆ Securities (publicly and closely held)

**OPTIONS:**

- ◆ Bequests
- ◆ Charitable Remainder Trusts
- ◆ Charitable Lead Trusts
- ◆ Bargain sales



VALLEY OAK  
(*Quercus lobata*)

*“I’ve been supporting environmental groups for decades. In that time, I’ve seen many groups come and go—it’s the nature of nonprofits fighting the good fight. But the goal of my funding hasn’t changed. That’s why I’ve left clear instructions with Tides in my Planned Giving Program. Having worked with the staff at Tides for some time, I feel more than comfortable that they will make sure my philanthropic goals are met in years to come.”*

— TIDES DONOR

**C**rafting a Planned Giving Program that is right for you begins with a phone call. We will work with you and your advisors to make sure your needs and goals are met every step of the way.

#### STEP ONE

##### *Contacting Tides*

If you are interested in creating a legacy of planned giving with Tides Foundation, please call us.

If you are new to Tides, please contact our Planned Giving Officer either by email at [plannedgiving@tides.org](mailto:plannedgiving@tides.org) or by phone at (415)561-6374. If you already have a Donor Advised Fund with Tides, please contact your Philanthropic Advisor. We will provide you with more detailed information about the Tides Planned Giving Program.

As always, your request for information will be treated in a confidential and professional manner.

#### STEP TWO

##### *Clarifying Your Intent*

Tides can assist you in clarifying your future funding goals and objectives.

Either your Philanthropic Advisor or the Tides Planned Giving Officer will walk you through a brief process aimed at ensuring that your goals and objectives can be carried out fully.

Are there particular types of organizations that you would like to support? Do you have any specific fields of interest (e.g., environmental sustainability)? Will your future funding goals and objectives be the same as your current funding priorities, or are there other areas of interest that you would like to explore?

These are just a few of the important questions that Tides will help you answer.



#### STEP THREE

##### *Designating a Successor Advisor*

Another important step is to designate a *successor advisor*—someone whom you trust to make recommendations to Tides regarding how the funds in your Donor Advised Fund are to be granted in the future.

Tides will work in close partnership with your designated successor advisor to ensure that your future funding goals and objectives are carried out in accordance with your wishes and intent.

#### STEP FOUR

##### *Meeting with Legal & Financial Advisors*

Once you have completed the initial steps, we will meet with you and your legal and financial advisors. Tides can provide you with information on our

Planned Giving Program, help you to clarify your intent, and document your choice of a successor advisor, if applicable. But only professional legal and financial advisors can help you create or make changes to your estate plan. Your professional advisors will carefully review your legal and financial situation, provide up-to-date information about federal and state tax laws, and help you choose a giving vehicle that best meets the needs of you and your family.

#### STEP FIVE

##### *Closing the Loop*

Once you have met with your legal and financial advisors, you will want to be sure that Tides is made fully aware of your plans. Either your assigned Philanthropic Advisor or Tides’ Planned Giving Officer will ensure that all of the required documentation is completed in order to ensure that your wishes are carried out to the best of our ability.

You may need to review your Planned Giving program with your professional advisor. Some gifts may require review by Tides’ legal counsel.



To learn more about Planned Giving with Tides, please fill out the return card in the pocket,  
or call (415) 561-6374. Thank you.



TIDES

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