

Atterdag Village of Solvang Planned Giving Series

The charities we love inspire us every day. Their ceaseless drive to change our community for the better is what gives us hope for the future. Sometimes saying “thank you” does not truly express just how much we care and how much we appreciate the impact they make.

Considering a planned gift is a proactive action of love and expression of gratefulness as we include our beloved charities in our end-of-life plans. Planned Giving allows you the opportunity to express your support in ways that are honoring, transformational, and inspiring to others.

Please join us for a series that educates on best practices and advocates for what might be best in your own personal planning. Bringing clarity, and time for questions, our **Planned Giving Consultant Lisa Higginbotham, Certified Fund Raising Executive** will guide us through these sessions.

**All Sessions will be at 5 PM, in the Atterdag Village of Solvang
CARL CHRISTENSEN COMMUNITY CENTER
636 Atterdag Road, Solvang, CA 93463**

RSVP (805) 688-3263

Session One - Wednesday July 26, 2023 INTRODUCTION TO PLANNED GIVING

- What exactly is it?
- Everyone’s “why” is different. Expressing that story in your giving plan
- Exposing the myth that planned giving is for the rich
- Derailers and how to navigate them

Session Two - Wednesday August 23, 2023 AVENUES OF APPROACH

- Designated vs undesignated gifts
- Gift vehicles you might not have considered
- Income driving charitable gift

Session Three - Wednesday October 25, 2023 LEVERAGING YOUR RETIREMENT ASSETS

- Secure Act 2.0 legislation and how it affects our giving
- Supercharging your RMD in Charitable giving
- Additional best practices that complement your current trust

Help us ensure that life throughout our Santa Ynez Valley remains vibrant for all!

Visit us at - [PeopleWhoCare.com](https://www.PeopleWhoCare.com)

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