



PHILADELPHIA BAR FOUNDATION

EQUAL JUSTICE  
LEGACY SOCIETY



The Philadelphia Bar Foundation  
is committed to promoting a basic  
human right to Philadelphia's most  
vulnerable residents:

**Equal Access to Justice.**

The Equal Justice Legacy Society allows friends of the Philadelphia Bar Foundation to include our organization as part of their estate planning. Planned giving options may have significant donor benefits and allow you to leave a legacy to the Bar Foundation and the entire legal services community of advocates. Please talk with your financial planner, lawyer, accountant or insurance agent about making a planned gift in your will. The Philadelphia Bar Foundation supports over 35 nonprofit legal aid organizations and has provided more than \$3 million in grants and assistance in the last five years. Your support through the Equal Justice Legacy Society will allow us to continue to ensure that nonprofit, pro bono lawyers deliver free, high-quality legal services to Philadelphia's most vulnerable residents.

# Find the Right Gift.

## LIFETIME GIFTS AND BEQUESTS

You may make a gift at any time during your life, simply by writing a check payable to the Philadelphia Bar Foundation. This gift will generate a federal income tax deduction for most people, reducing the cost of the gift to you. Remembering the Bar Foundation in your will or bequest is the easiest and most popular method of charitable giving. Your gift costs nothing now, but offers the satisfaction of knowing that your legacy will ensure the Bar Foundation's future and impact Philadelphia's most vulnerable residents.

## GIFT OF STOCK OR OTHER SECURITIES

Giving stock to a charitable organization is a wonderful way to stretch your gift even further. If you have owned the stock for more than a year, you receive a tax deduction for the full fair market value of your securities and avoid paying any capital gains tax on appreciated stock.

## RETIREMENT PLAN ASSETS

Unused retirement assets can be used to make a charitable gift. Making the Philadelphia Bar Foundation the beneficiary of your retirement plan ensures that the full amount of your retirement assets will benefit our mission in promoting equal access to justice.

## LIFE INSURANCE

The gift of a life insurance policy carries the benefit of a significant charitable deduction. Consider these two ways to set up this gift:

- To receive a significant charitable deduction, irrevocably designate the Philadelphia Bar Foundation as both the owner and beneficiary of your policy.
- Retain ownership of the policy, but name the Philadelphia Bar Foundation as its irrevocable beneficiary.

*Consult with your insurance agent for more details.*

## CHARITABLE TRUSTS

Charitable trusts allow you to make a significant contribution to the mission of the Philadelphia Bar Foundation. There are two types of charitable trusts:

- **Charitable Remainder Trusts:** allows you to irrevocably transfer assets, while you and your beneficiaries receive payments over the course of your life or another period of time you choose. The Bar Foundation would then receive the remainder of the trust.
- **Charitable Lead Trusts:** allows you to donate a portion of the trust to the Bar Foundation. When a specified time has passed, the beneficiaries would then receive the remainder of the trust.

These trusts also yield an income tax deduction in the year the trust is established and may be used in planning for retirement and providing funds for educational expenses for children, grandchildren, or other loved ones.



**Build Your Legacy on Hope,  
Justice, and Compassion.**

**Support Our Work.**

Your gift can make an impact on the livelihoods of families and communities in Philadelphia. Ensure the Bar Foundation continues its work in strengthening the legal aid and pro bono systems and advancing equal access to justice.



The Philadelphia Bar Foundation is dedicated to promoting access to justice for all people in the community, particularly those struggling with poverty, abuse, and discrimination. We strengthen the legal aid and pro bono systems and raise public support through unrestricted grants, training programs, technical assistance, fellowships, and awards.

*Let us know how we can help you to combine lasting philanthropy with effective financial and estate planning.*

Contact **Jessica R. Hilburn-Holmes, Esq.**, Executive Director of the Philadelphia Bar Foundation, at 215-238-6347 or [jhilburnholmes@philabarfoundation.org](mailto:jhilburnholmes@philabarfoundation.org).

PHILADELPHIA BAR FOUNDATION

**EQUAL JUSTICE LEGACY SOCIETY**

