

Rhode Island
Foundation

Plan Your Legacy with the Rhode Island Foundation

Your generosity. Your values.
Rhode Island, forever.





As Rhode Island's only community foundation, we mobilize generosity and motivate change that makes a difference.

Our local roots, statewide relationships, and century of experience anchor our work, and our hopes for our home reach high.

Since 1916, we've been a funder and true partner to those who help this state thrive, working hard at each table, across every community, by their side to improve the lives of all Rhode Islanders. Only together – through strong partnerships and building on work that's come before – can we create progress that lasts.



Your generosity can live on... forever

Generations of charitable Rhode Islanders have left philanthropic gifts, through the Rhode Island Foundation, that have helped shape Rhode Island into the amazing place we call home.



The world is changing, and the needs of Rhode Island are ever evolving. By leaving a gift to the Rhode Island Foundation through your will or estate plan, your own legacy will live on and make a lasting impact for generations to come.

Gifts in your will Naming the Foundation in your will or trust is simple. A charitable bequest can be for a specific dollar amount, a percentage of your estate, or what remains after other bequests have been fulfilled. With a bequest, you maintain complete control of your assets during your lifetime – and can save on income taxes, capital gains taxes, and estate taxes.

Beneficiary designations You can designate all or a portion of your bank, investment, or retirement account, annuity, or insurance policy to the Rhode Island Foundation. It can be as simple as completing a change of beneficiary form. A beneficiary designation can reduce income and estate taxes, leaving more for your loved ones.

Gifts that pay you You can create a gift to the Rhode Island Foundation that pays you or someone you choose for life. Life income gifts, like charitable gift annuities and charitable remainder trusts, provide favorable tax benefits, allow you to secure an income stream for yourself or a loved one, and make a meaningful long-lasting gift that supports your community.



Your IRA can be a terrific way to make a tax-wise gift to the Rhode Island Foundation.

If you are age 70½ or older, you can make a direct charitable contribution from your IRA each year – with no income tax on the withdrawal. Simply tell your IRA administrator you wish to make a “qualified charitable distribution” (QCD) to the Rhode Island Foundation. Your QCD will count toward your annual required minimum distribution.

You can allocate your gift to the Fund for Rhode Island or establish a named fund of your own – to support a field of interest, or to benefit specific charities you care about, in perpetuity.

Join the 1916 Society

Named to honor the year the Rhode Island Foundation was founded, the 1916 Society welcomes donors who have chosen to partner with us by making a gift through their will or estate plan.



You will join a special group of dedicated supporters who have chosen to invest in the well-being of our home state and its people – beyond their own lifetimes.

As a member, you will receive:

- **Invitations to exclusive events and regular communications from the Foundation**
- **Access to Foundation staff as a resource for further charitable planning**
- **Recognition on our digital donor wall at One Union Station, if you choose**
- **The satisfaction of knowing your generosity will help shape Rhode Island for generations to come**

We are honored to recognize those who have chosen to secure a brighter future for the people and communities of Rhode Island.



Discussions regarding a donor's estate, financial plan, or personal circumstances are held in strict confidence. Donors may also request that their gifts remain anonymous.

The information contained in this piece is for general education and knowledge. It is not designed to be a substitute for professional tax or legal advice.



Let us help you create
your legacy.

Setting up a planned gift to the Rhode Island Foundation is simple and deeply satisfying. Reach out today and be paired with an experienced team member who can work with you – and your lawyer or professional advisor, if you wish – to create a charitable legacy that will meet community need long into the future.

Contact us:

(401) 427-4040 | giving@rifoundation.org

One Union Station Providence, RI 02903

rifoundation.org/legacy

**Rhode Island
Foundation**