



# Planning Your Legacy Gift



## Your Legacy

As we age, we want to feel that our life mattered. Our legacy should reflect the way we want others to remember us. How we live and what we value tells others what was most important to us. Often, our example to those we care about is measured by where we invest our time, talents, and treasure.

Since 1973, Aroostook Agency on Aging – through its founders, leadership, staff and volunteers – has worked to improve the quality of life and promote the well-being of older people, those with disabilities and their caregivers in our communities. This mission, we hope, will be our legacy.

Our experience tells us there are many others who share our passion and wish to ensure the ones they love will be cared for and supported in the future. To this end, the Aroostook Agency on Aging Foundation has been established and structured to accept legacy gifts.



**AROOSTOOK  
AGENCY ON AGING  
FOUNDATION**

**(207) 764-3396**

**1-800-439-1789**

**TTY Dial 711**

**PO Box 1288**

**Presque Isle, ME 04769**

**[aroostookaging.org](http://aroostookaging.org)**

*The Aroostook Agency on Aging Foundation complies with applicable Federal civil rights laws and does not discriminate on the basis of physical or mental disability, race, color, creed, age, sex, sexual orientation, religion, ancestry, or national origin in admission to, access to, or operation of its services, programs, or activities.*



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Friends of the Agency tell us they would like to make a meaningful and lasting impact on our programs and services. Making a legacy gift to the Aroostook Agency on Aging Foundation is a great way to do just that!

A legacy gift can be made in a number of ways:

- A bequest in your will or living trust
- A beneficiary of your life insurance policy or retirement funds
- Charitable trust or annuities
- A gift of stock or real estate

Legacy gifts can be dedicated for use for specific purposes based on the wishes of the donor. Your financial advisor or attorney can help guide you and ensure your intentions are clearly defined.



## Bequests

One of the easiest ways to make a planned gift to the Aroostook Agency on Aging Foundation is to include a bequest statement in your living will or living trust.

A share of your estate can be designated as a percentage or specific dollar amount. You can also gift the residual, or the remainder, of your estate once all other considerations are settled.

*"I bequeath [ \_\_\_% OR \$\_\_\_ OR the remainder of my estate] to the Aroostook Agency on Aging Foundation, PO Box 1288, Presque Isle, ME 04769."*

If your will is already prepared, a gift to the Aroostook Agency on Aging Foundation may be added to your existing will as an addition or codicil. Your bequest is deductible as a charitable gift for estate tax purposes.

## Making a Gift

The first step to make a legacy gift is to contact our office. We can share information about our programs and services.

If you have named the Aroostook Agency on Aging Foundation as a beneficiary in your plans, please let us know as we want to thank you for your legacy gift!



**Yes!**  
My financial plans already name Aroostook Agency on Aging Foundation as a beneficiary.

**Please contact me** to discuss how to include the Agency's Foundation in my planned giving.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email address: \_\_\_\_\_

Please mail this form to:  
**Aroostook Agency on Aging Foundation**  
PO Box 1288 • Presque Isle, ME 04769

