

GIFT YOUR RETIREMENT ASSETS

By naming B1C as a beneficiary of your retirement plan, you can enjoy retirement now – and then give back to your favorite causes for generations to come. This gift also minimizes the tax impact to your heirs.

BENEFITS

- Continue taking regular lifetime withdrawals.
- Give generously to charity in the future.
- Ability to adjust your beneficiary designation if your family's needs change.
- Become a member of B1C Visionaries, enjoy its benefits and inspire others.

WHAT CAN I GIVE?

- IRA
- 401(k)
- Other qualified retirement assets

Talk with us and your legal and financial advisors to learn more.

THINGS TO CONSIDER

- You may choose to gift the full balance or a percentage of your retirement assets.
- Because tax laws change, please consult with your financial and legal advisors.

GET STARTED

To make a gift of retirement assets, contact your plan administrator or financial/ legal advisor and request a Change of Beneficiary/Ownership Form. Then, designate Building One Community as a beneficiary to receive the balance or a percentage of your plan.

Before taking any action, please contact Valeta Prendergast, Development & External Relations Director, at development@b1c.org or (203)-674-8585 Ext. 141.