

Continuing a Proud Tradition of “Taking Care of Our Own”



Have you considered a Charitable Remainder Trust?

As a long-time friend and supporter of the SENIOR LIVING FOUNDATION, you may be interested in knowing how to provide income for you (and, if desired, a surviving beneficiary) while also supporting our mission “to take care of our own.” Creating a Charitable Remainder Trust is an effective way to provide additional income while creating a legacy that will benefit others for years to come through the SENIOR LIVING FOUNDATION.

Since there are several types of Charitable Remainder Trusts, you have the option to select the one that best suits your needs. Most financial institutions require a minimum balance to establish a Charitable Remainder Trust. Financial advisors or attorneys whose expertise is in charitable giving can help you decide which Charitable Remainder Trust works best for you. The SENIOR LIVING FOUNDATION has sample trust agreement forms for your review, but we cannot provide legal advice. If you do not have a financial advisor or attorney to assist you with establishing a Charitable Remainder Trust, we can provide you with names of well-respected attorneys in the Washington, DC metropolitan area who have expertise in this field.

By transferring your available assets into a Charitable Remainder Trust and naming the SENIOR LIVING FOUNDATION as the beneficiary, you can establish a set percentage return for one or more lives or for a specific number of years.

At the end of the Charitable Remainder Trust, the remaining assets will be transferred to the SENIOR LIVING FOUNDATION to assist those who depend on the Foundation — former colleagues who have nowhere else to turn for help with their increasing medical and other living costs. Such a gift will assist the Foundation in fulfilling its obligations to these grateful individuals. You will be remembered for your legacy of generosity to those in our Foreign Service family who need our help. ■

Benefits

While potentially increasing your disposable income throughout the rest of your life and creating a legacy that will benefit others, you may also achieve tax benefits with a Charitable Remainder Trust.

- You receive a charitable income tax deduction for the value of the SENIOR LIVING FOUNDATION’s remainder interest in the Charitable Remainder Trust in the year you make your gift, with an additional five years to carry over any unused deduction.
- You may defer or reduce capital gains liability on any appreciated assets that you contribute to a Charitable Remainder Trust.
- Your estate tax liability may be reduced because the SENIOR LIVING FOUNDATION’s interest under the Charitable Remainder Trust is not subject to estate taxes.

A Charitable Remainder Trust can offer increased yields on your assets, while making the promise of much needed help for others later. ■



Successful Planning, Successful Legacy

Your Charitable Remainder Trust can help you and other friends of the Foreign Service. Recently an ambassador who had served most of his career overseas decided to establish such a legacy to assist some of his Foreign Service colleagues who turn to the Foundation for assistance. He felt that by establishing a Charitable Remainder Trust with his remaining assets to be distributed to the SENIOR LIVING FOUNDATION, he could thank those and others for their duty and dedication. With a Charitable Remainder Trust he was able to receive additional income, when he needed it, and leave the remaining assets of the trust to the SENIOR LIVING FOUNDATION upon his death. His gift directly benefited almost 25 individuals in the first year and will continue to provide much needed assistance to others in the future. ■

*We wish to thank those
who have given in the past and those
who continue to support the Foundation.*



*Now, through your Charitable Remainder Trust,
you are helping the Foundation meet the long-term
needs of Foreign Service colleagues.
The need continues to grow - and
we will be here to “take care of our own.”*

Thank you for considering a Charitable Remainder Trust

APPLICATION FORM

Please return this card to us if you would like more information or if you are considering a Charitable Remainder Trust to further the mission of the SENIOR LIVING FOUNDATION.

Establishing a Charitable Remainder Trust with the distribution of your remaining assets to the SENIOR LIVING FOUNDATION will benefit many in the Foreign Service family for years to come. The information that you provide will help us in our long-term planning to “take care of our own.”

Name _____

Address _____

E-mail Address _____

Home Phone _____ Work Phone _____

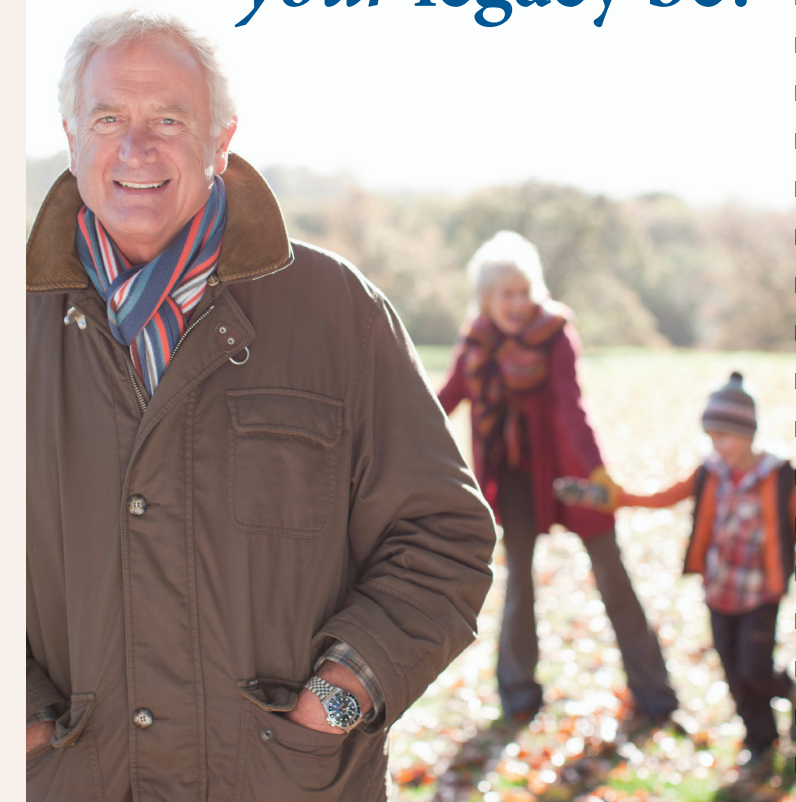
- Yes, I am interested in establishing a Charitable Remainder Trust. Please have a Foundation coordinator contact me.
- I have already established a Charitable Remainder Trust leaving the SENIOR LIVING FOUNDATION my remaining assets upon my death.
 - Please use my name on lists and publications in recognition of my support of the SENIOR LIVING FOUNDATION as a member of the Legacy Action Group.
 - I prefer to remain an anonymous member of the Legacy Action Group.

Comments _____

◆ Please return this form in the self-addressed envelope provided.

SENIOR LIVING FOUNDATION
OF THE AMERICAN FOREIGN SERVICE

What will your legacy be?



Help us continue
a proud tradition of
“taking care of our own”

SPONSORED BY THE
AMERICAN FOREIGN SERVICE PROTECTIVE ASSOCIATION

SENIOR LIVING FOUNDATION MISSION

The mission of the Senior Living Foundation of the American Foreign Service is to provide support to retired Foreign Service personnel and their spouses (including surviving and divorced spouses) and, on the basis of need, to defray the cost of home health care services, senior housing, long term care insurance, or other senior services that contribute to the health and security of the retired Foreign Service family.

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SENIOR LIVING FOUNDATION
OF THE AMERICAN FOREIGN SERVICE

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Web site: www.SLFoundation.org

The Senior Living Foundation of the American Foreign Service is a tax-deductible 501(c)(3) charitable organization.

If you or someone you know may need assistance, please contact us. We are here to help.



We invite you to establish your legacy by supporting the proud tradition of “taking care of our own”.

The Senior Living Foundation

Thank you for your generous and continued support of the SENIOR LIVING FOUNDATION. The Foundation continues to assist retired members of the American Foreign Service and their spouses who have become physically and/or mentally unable to cope with factors of life that they face during their later years. In many cases, these people have barely enough financial resources to cover their normal living expenses. As knowledge of the Foundation spreads, we hear from more people who can use our help. We turn to individuals like you to help us continue our important work well into the future by naming the SENIOR LIVING FOUNDATION as the beneficiary in a Charitable Remainder Trust. ■



“Real generosity toward the future lies in giving all to the present.”

Albert Camus

