



LIVE A LEGACY

Stopping for the One for Generations to Come

www.irisglobal.org

WHAT IS LEGACY GIVING

Legacy giving, also known as planned giving or bequest giving, refers to a type of charitable giving in which individuals make provisions in their wills or estate plans to leave a portion of their assets or estate to a charitable organization or cause of their choice. Legacy giving allows individuals to continue supporting organizations even after their lifetime.

WHERE TO START

Before legacy giving can take place, donors should take some steps toward estate planning. We are ready and willing to help you through this process. On page 2 of this guide, we have included information and a checklist to help you get started with your legacy planning. Additionally, you can reach out to our team today to help you get started.

A gift in your will or living trust extends your support for Iris Global across generations and enables you to make a bigger impact than you ever thought possible.

TYPES OF LEGACY GIFTS

1. Bequests

A bequest is a gift made to a nonprofit organization as part of a donor's will. This gift can be a specific amount or a percentage of the estate.

2. Beneficiary Designation

Beneficiary designation refers to naming an organization as a beneficiary of assets, such as real estate, retirement plan, life insurance policy, or trust.



PLAN YOUR GIFT

DETAILS

- Legal Name: Iris Global
- EIN: 33-0648658
- 933 College View Drive Redding, CA 96002

CONTACT

- Joy Ercoli 530-255-2077 ext 1590
- joy@irisglobal.org
- <https://www.irisglobal.org/give>



CONNECT WITH US

Please let us know if you have or would like to include Iris Global in your legacy planning — we would love to thank you personally!

EMPOWERING BIBLICAL STEWARDSHIP

Stopping for the One for Generations to Come

Estate planning is important for everyone, regardless of the size of their estate. Everyone has an estate, even if it consists only of a few personal belongings. Upon your passing, your estate will likely go through a legal process called probate. Probate is the court-administered process of gathering your assets, paying your debts and taxes, and distributing your assets to your beneficiaries.



IS YOUR ESTATE PLAN UP TO DATE?

Our checklist to help you get started

- Have you set up a will or trust?
- Have there been any births, deaths, or marriages in your family or any tax law changes?
- Are your Power of Attorney and Healthcare Directive current?
- Are your beneficiary designations current?
- Have you considered your charitable legacy plan and updated your documents accordingly?
- Are your documents stored in a safe place with your family and estate administrator?
- Have you communicated with your family and named the executor of your estate?
- Have you set up your digital estate plan? i.e., created a list of your online accounts, instructions for social media, etc



MATTHEW 6:20

Store up for yourselves treasures in heaven, where moths and vermin do not destroy, and where thieves do not break in and steal.



ENGIVEN

Iris Global has partnered with Engiven to assist you in the strategic planning of your family's legacy.

Call us or [click here](#) to get started with your free SmartWill today.



OTHER OPTIONS

We can also help you set up long-term stewardship through:

- Donor advised funds
- Stock donations
- 401k distributions
- Real estate
- and more