

Planned Giving FAQs

What is Planned Giving?

Planned Giving allows you to leave a lasting legacy to charitable organizations as part of your overall estate and financial plan. It helps you support MarinMOCA in a way that best suits your individual needs. Many planned gifts require no payments while you are living; others may actually increase your income.

How do I make a planned gift?

There are many ways to leave a legacy to MarinMOCA. You can include MarinMOCA in your will (this is called a bequest), or designate us as a beneficiary of your retirement plan, life insurance policy, or investment account. There are also gifts that give back to you by providing income for life and gifts that help you minimize income and estate taxes.

Is there a minimum required gift amount?

MarinMOCA is grateful for any amount that you wish to provide.

What is a charitable gift annuity and how does it work?

A charitable gift annuity is a gift to MarinMOCA that pays you back by providing lifetime income payments in exchange for your contribution.

What is a charitable remainder trust and how does it work?

A charitable remainder trust is a trust that benefits you or your beneficiaries as well as MarinMOCA. Similar to a charitable gift annuity, the trust makes annual payments in return for your gift.

How do I make a gift of stock?

Stock may be gifted to MarinMOCA without a change to your will or trust. We can work with your broker to facilitate a gift of stock.

Can MarinMOCA accept artwork, a car, or other property?

We are occasionally offered gifts of artwork or personal property. Prior to accepting such a donation, our trustees will want to review how the gift fits with our property and art collection strategy.

How much of my gift is tax deductible?

The amount of income tax deductions depends on the type of gift you make to MarinMOCA. Your tax advisor can help you determine this amount.

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Will MarinMOCA draft the changes to my will or estate plan to make the gift?

We are not licensed to make changes to your will or estate plans, but your estate attorney will be able to do that for you.

What if I change my mind about my planned gift?

You may change or eliminate your planned gift at any time. Your attorney can adjust your will or trust according to your instructions.

Who can I talk to about making a legacy gift to MarinMOCA?

Please contact Nancy Rehkoppf, Executive Director, at 415-637- 9730, or by email at nancy@marinmoca.org.