

The SDCSL Legacy Society
Your Final Tithe
Sonoran Desert Center for Spiritual Living Planned Giving

The SDCSL Legacy Society promotes planned giving to ensure our center thrives into the future. You will be honored forever as a Legacy Society Member with your bequest and enrollment in during 2021. We have designated that a new memorial be constructed in the sanctuary to recognize those who become members of the Legacy Society.

Why a Legacy Gift?

Your gift can have a lasting impact. Our biggest successes were made possible by individuals making substantial contributions of time and money.

What is a Planned Gift?

A Planned Gift is a gift made to an eligible charity, like SDCSL, upon the donor's death. It is a "planned" gift in that arrangements are made and instructions given during your lifetime, for completion only after your death.

There are many reasons why SDCSL members might think of leaving a planned gift to support the center. Most reflect their own sense of value in the center and the desire to leave a sustaining legacy behind when they pass.

For many members, SDCSL has been a source of spiritual fulfillment, enrichment, learning, and camaraderie for years, and they want to leave a gift to make our center even better. They want to make sure that our center remains relevant and Spirit filled in the future.

But, whatever the reason, the beauty of a planned gift is that it is almost always possible to leave a larger planned gift than would have been possible during your lifetime.

What is the Best Way to Leave Such a Gift to SDCSL?

The best way is a personal decision and depends on your individual circumstances. There are a number of ways to give that range from simple to complex. Simple approaches tend to be revocable in nature and complex tend to be irrevocable.

Revocable Gifts

Bequests: Perhaps the most obvious way to make a planned gift is with a provision in your will or trust, stating that SDCSL should receive a gift (either a specific asset, specific amount, or percentage of your estate) upon your death.

Although it may be a simple process, a bequest might not be the best way for you. If you have a traditional Individual Retirement Account (IRA) or other tax deferred retirement account, you can make SDCSL a beneficiary of the IRA, stated as a percentage of the total value. You simply make a new beneficiary designation naming SDCSL as a beneficiary and, upon your death, SDCSL will receive the gift. The reason this might be a better way is that SDCSL is tax exempt, so what would have been taxable, if left to your heirs, is not taxable to SDCSL. The basic objective is to leave taxable assets to charity and nontaxable assets to your heirs.

Other Revocable Planned Gifts:

- A legacy gift of real property
- A payable on death (POD) designation on a bank or brokerage account
- A designation of beneficiary of a life insurance policy
- A designation of beneficiary of a donor advised fund.

Irrevocable Gifts

Irrevocable gifts might be an appropriate option, because they provide income and tax benefits now, in exchange for an irrevocable future gift to SDCSL. One option is a Charitable Remainder Trust (CRT) for more flexibility and control with the same or better income and tax benefits. A CRT involves higher maintenance costs and works best for a larger planned giving program. Because of their nature, you should always consult with your legal and tax advisors before making any irrevocable gift.

We can't provide tax or legal advice but we can answer many questions relating to various types of planned gifts and which type might work best for you.

What will your legacy be?

Designate Gifts to:

Sonoran Desert Center for Spiritual Living (SDCSL)

Address: The Sonoran Center, 2050 Territory Lane, Amado, AZ 84645

Mailing Address: PO Box 1598, Green Valley, AZ 85622

Phone: 520-625-6100

IRS Tax ID:

Join the SDCSL Legacy Society

Add your name as a member by enrolling with your charitable bequest in 2021.