

Reflect on your life values and consider the possibilities

Satisfaction
knowing that you are giving back to a cause that holds special significance for you.



Peace of Mind
Ensuring that financial matters are resolved privately

Convenience
Putting your investments in the hands of professionals so you don't have to worry about ongoing decisions



Security
Finalizing your charitable choices now instead of later or never

Financial
Lowering your current taxes and/or lowering the taxes your estate will be required to pay



Mission Statement

Alpha Resource Center of Santa Barbara is committed to empowering individuals with developmental disabilities, supporting families and fostering a community that values the contributions of all people.



For more information contact

Cory Woodruff at Alpha:
4501 Cathedral Oaks Road
Santa Barbara, CA 93110
805 683-2145 ex106
cwoodruff@alphasb.org

alpha
RESOURCE CENTER
OF SANTA BARBARA



Alpha Resource Center is a 501(c)(3)
Non-Profit Corporation.
All donations are tax-deductible.
Federal Identification #95-1966996

Your Legacy
will make their dreams possible

Start Today

Your Legacy will help ensure special needs children have an enriched life

Thank you for your interest in sustaining the legacy of Alpha Resource Center of Santa Barbara. Our hope is to serve you and your family with helpful information on how you can include Alpha in your legacy plan.



- **Charitable Remainder Trusts:** A charitable remainder annuity trust pays a fixed income based on a percentage of the initial contribution. When the trust matures the remainder goes to Alpha. Charitable remainder unitrust pays a variable income based on the value of the trust each year. The payout rate is determined when the trust is established. When the trust matures the remainder goes to Alpha.
- **Charitable Lead Trusts:** This type of trust pays income to Alpha for a specified number of years and returns the asset to the donor when the trust matures.
- **Bequests:** This may be the easiest way to make a future gift to Alpha. Simply ask your attorney to draft a new will for you or add a codicil to your existing will.
- **Charitable Gift Annuity:** A gift annuity pays a fixed income for life to you and your spouse, or a person you designate to be the beneficiary. A portion of the income is tax-free. Gift annuities can be set up so that you receive present income or deferred income. Upon the death of the beneficiary Alpha receives the balance of the principal as a gift.
- **Testamentary Trusts:** Your attorney can include a variety of trusts in your estate plan that will provide benefits for your family and your favorite charities, including Alpha. Contact your estate planners to discuss trusts that provide you with excellent tax benefits and help you make a sustainable gift to Alpha.
- **Real Estate Appreciated:** Property is an excellent asset to be used as a charitable gift to Alpha. Contact us about gifts of real estate that may help you avoid high capital gains taxes.
- **Life Insurance Policies:** Paid-up, or partially paid-up, policies may be donated to Alpha. Or, you may purchase a new policy in which Alpha is the sole owner and the beneficiary.



Alpha is the only Santa Barbara based organization that provides life-span services to over 2,200 individuals and their families

Your legacy will build healthy friendships

For more information contact your trusted financial advisor, accountant, or our Development office at 805 683-2145