Planting Seeds for the Future

“Francis Parker School has been there for my family—children and grandchildren—and I really want to give back in some way.” One grandparent feels so strongly about Parker’s impact on their family that they have chosen to join Parker’s Legacy Club and help plant the seeds to sustain the School’s future.

“My deep appreciation for Parker begins with the visionary and extremely capable leadership and teachers. They truly care about educating students and preparing them for the world they’ll enter when they graduate. Parker offers engaging classes that excite the students so they want to learn. On Grandparents & Special Friends Day, you can witness the dynamic teaching styles and the passionate teachers.”

Our donor has chosen to remain anonymous, however, is proud to share why they feel it is important to leave a legacy gift to Parker. “As anyone can see when visiting either of Parker’s Campuses, there is a wonderful feeling of respect and kindness that you simply don’t see at most other schools. You can see and feel that students enjoy being challenged here; both by their teachers and peers.”

“I can’t emphasize enough how much I appreciate Parker for my family. It goes beyond appreciation; it’s a genuine love.”

“In addition to the high level of academics, students at Parker have so many opportunities to experience new things, igniting new interests and passions. How many schools today encourage trying out woodworking, music, theater, ceramics, photography, sports, robotics, and so much more? You just don’t see these opportunities at other schools.”

Parker’s mission to make students good citizens of the world is incredibly important to this grandparent. “The global experiences are fabulous opportunities to see and experience different cultures, while using languages skills learned in classrooms, and being more open to new experiences which will help them prepare for their future.”

Remembering their first gift to Parker will always be special to this grandparent. “I felt it was important to stand up and show my admiration for the teachers and staff.” This first gift was several years ago, followed by several annual contributions, but the largest gift will be the legacy gift, one they are most proud of.

“My decision to leave a legacy gift is driven by the strong desire to do something to pay back to this wonderful institution. Actually, it’s not so much about paying back, as it is about paying forward. I feel the need to provide for future generations, just as others have planted seeds which benefited my family.”

There are many different ways to make an impact by leaving a Legacy gift. “The School encourages people to do what is right for them, as everyone’s situation is different. For me, creating a charitable remainder trust made sense.”

This donor wants to inspire others to do the same. “Everyone who is grateful for the experiences they, their children, or grandchildren have received, should consider leaving a planned gift to Parker.” All gifts—large and small—collectively, move the School forward, providing financial stability, allowing it to focus on providing academic excellence for the next generation, and beyond. The Legacy Club honors like-minded people who have made a planned gift to Parker, sharing their gratitude for the strong foundation their children (and grandchildren) received.
Partnering for Parker’s Future

Have you thought of how you can continue to encourage excellence at Parker for generations to come? Your support will help create a strong, sustainable future for Parker and our students. Planned gifts can support a wide variety of initiatives, including academics, arts, athletics, faculty professional development, and student financial assistance, to name just a few. Every gift will impact the educational journey and enhance the experience of Parker students. We understand that these priorities are important to you and your family. We invite you to contact us to discuss a variety of gift options that provide tax incentives today and help you achieve your philanthropic goals. We can partner together to enhance Parker’s future.

What is Planned Giving?

Planned giving is the art of designing charitable gifts so that you realize your philanthropic objectives while minimizing your after-tax cost. Planned gifts accomplish two worthy goals at once: ensure Parker offers an exceptional education to future generations of bright students and provide financial benefits for you and your loved ones. Planned gifts are a way to honor Parker and put your own finances on firm ground.

A wide range of planned giving choices present practical options to contribute to the School’s well-being that may create financial and tax advantages for you. Whether you want to put your donation to work immediately or design a plan that benefits our students after your lifetime, giving back to Parker as part of your planning will enable you to honor Parker’s past and secure its future. We invite you to think about the legacy that you can leave to the Parker community.

Gifs That Pay You Income

**CHARITABLE GIFT ANNUITY**

The charitable gift annuity is among the simplest and most popular of the charitable life-income plans and may be funded with cash or appreciated securities. You may benefit from an immediate charitable income tax deduction, and may get relief from tax on capital gains. Payments to you may begin immediately or be deferred until a time when the money is most needed. The latter option is particularly attractive if you have a high current income, can benefit from a current tax deduction, and/or are interested in augmenting future retirement income on a tax-favored basis. Following your lifetime, the assets remaining go to support the mission of Francis Parker School.

**CHARITABLE REMAINDER TRUST**

A charitable remainder trust is popular because of the significant financial and estate planning flexibility it offers. This trust may be funded with cash or appreciated assets such as securities, real estate, or other property. You receive an immediate charitable income tax deduction and income, and may get relief from tax on capital gains. Depending on the type of remainder trust you set up, you and other beneficiaries can receive income for life or a set number of years. When the trust expires, the assets remaining in trust go to support the mission of Francis Parker School.

**CHARTERABLE LEAD TRUST**

A charitable lead trust may be an excellent way for you to transfer significant assets to your children or grandchildren without payment of gift or estate taxes, depending on how it is structured. Charitable Lead Trusts are very appealing income and wealth transfer vehicles for donors with large estates. The trust pays income to Parker for a certain period of time and then either returns the assets to you or distributes them to your heirs at your passing.

**LIFE INSURANCE**

Assignment of a life insurance policy makes it possible for you to convert a lifetime contribution of premium payments into a much larger gift of insurance proceeds at death and receive some beneficial tax savings. You receive a charitable deduction for the current value of the policy, in addition to receiving a deduction for any premiums you subsequently pay. You may benefit from an assignment of life insurance policy by converting any premiums you subsequently pay.

**RETIREMENT PLAN**

A simple way to make a gift from your retirement plan is to name Parker as a beneficiary of all or part of what might remain in your plan upon your death. Such a gift is not subject to income or estate taxes when paid to a charitable organization such as Parker.

**RESIDUARY TRUST**

This ensures that your estate is left to your beneficiaries as intended. Charitable bequests enable you to make significant gifts that you could not have made during your life. Naming Francis Parker School (San Diego, CA) as a beneficiary of your will or living trust can reduce or eliminate your taxable estate.

**TYPES OF BEQUESTS**

- **Bequest of Property**: Parker receives specific assets, such as securities, an interest in real estate, or tangible personal property.
- **Contingent Bequest**: Parker receives all or a percentage of the remainder of the estate after the payment of any specific bequests and all estate-related expenses.
- **Residuary Bequest**: Parker receives a bequest only in the event of the death of other beneficiaries. This ensures that property will pass to Parker rather than to unintended beneficiaries, including the government.

**Sample bequest language**

**Bequest of Property**

Sample language available online at: francisparker.org/plannedgifts

**WILL AND LIVING TRUSTS**

A bequest is a statement in your will or living trust which passes a portion or all of your estate to another person, persons, or charitable organization. Charitable bequests enable you to make significant gifts that you could not have made during your life. Naming Francis Parker School (San Diego, CA) as a beneficiary of your will or living trust can reduce or eliminate your taxable estate.

**Planned Giving Options**

- **CHARITABLE LEAD TRUST**
- **WILL AND LIVING TRUSTS**
- **LIFE INSURANCE**
- **TYPES OF BEQUESTS**

**WE’RE HERE TO HELP!**

The Parker Advancement staff is available to answer your questions about planned giving.

Shara Freeman Hoefel
Head of Advancement
858/569-7900 x 4106

Debbie Kempinski
Sr. Director of Development and Stewardship
858/569-7900 x 4139
Members of the Legacy Club

Members of the Legacy Club play an integral role in securing Parker’s future through planned gifts. Since most of these generous gifts will be realized by Parker after the donor’s lifetime, the Legacy Club was created to thank donors for their intentions during their lifetime. Please visit francisparker.org/plannedgifts to learn more.

The Anklesaria Family
Daniel ’88 and Susan Frazee
Sammy Gross ’71
Julie Johnson Iavelli ’49
Gert* and Aline Koppel
Lawrence Leffler ’80
Morton* and
Betty Jean Lichtman
John and Carol Lindholm
Cathy Lutge
Marc Matys and Robert Gleason
Romeo and Mila* Quini

Dennis Regen and
Christine Hickman Ragen
John ’84 and Desiree Romero
Leslie and Marjorie* Rose
Dorothy Shumway
Mitch and Elizabeth Siegler
Jeff ’75 and Karen Silberman
Jim* and Reggie Smith
Sandra Snook
Michael and Catherine Thiemann
James and Kathy Waring
Anonymous

In Memoriam Members:
Margaret Simison Calhoun ’32
Esther E. Cleaves
Adele Rice Foster ’23
Amelita Galli-Curci
Rosalind Harris ’29
Bruce R. ’32 and Mary Hazard
Helen-May Marcy Johnson
Ethel Mintzer Lichtman 40
Henry ’29 and Ruth Lippitt
Mary C. Moore

* = deceased
(list updated 6/1/2019)

Thank you to all our Legacy Club members for your wonderful commitment to the Parker community - for today and tomorrow.

If you have not yet thought about your legacy to Parker, we invite you to join the Legacy Club. Your planned gift will have a long-lasting impact on the Parker community for generations to come.

If you have already included Francis Parker School in your estate plans, thank you! Please contact the Advancement Office so we can welcome you into the Legacy Club and thank you for your support and generosity.