FREQUENTLY ASKED QUESTIONS

Q. What does it mean to join the PathPoint Legacy Society?

A. It means you have informed PathPoint that you have included a provision for them in your estate plans.

Q. Is there a minimum amount needed to join?

A. No. Estate gifts of ALL sizes are welcome. We invite those who join to give us an estimate of their intended future gift, but this is not required to join.

Q. Is joining the PathPoint Legacy Society legally binding?

A. No, joining is the expression of your current intention only.

Q. Can I change my mind?

A. PathPoint won’t receive your gift until after your death. During your lifetime, you can amend anything you choose, such as amounts or beneficiaries.

Q. Do I need to hire a lawyer?

A. You do not need a lawyer to join the PathPoint Legacy Society, but an estate planning attorney is recommended to establish an estate plan that will best serve you and your family. You may find sample bequest language on our website www.PathPoint.org or call us to request a copy.

“As a parent of a person with a disability, I've supported my son through obstacles and challenges...and I’ve watched him break down barriers and challenge stereotypes, thanks to the support and services of PathPoint, formerly Work Training Programs. That is why I am a proud parent and a Founding Member of the PathPoint Legacy Society. I invite you—parents, families, and friends—to join me in ensuring the future for George and others after him by joining the PathPoint Legacy Society today.”

James McDonald
Founding Member of the PathPoint Legacy Society

QUESTIONS ABOUT MEMBERSHIP AND BENEFITS IN THE PATHPOINT LEGACY SOCIETY MAY BE ADDRESSED TO:

PathPoint Community Engagement Office
Phone: 805.966.3310, ext. 1028
E-mail: Legacy@PathPoint.org

PATHPOINT
LEAVE A LEGACY OF LEARNING, LIVING, BUILDING COMMUNITIES.

LEGACY SOCIETY
LEAVING A LEGACY

Would you like to ensure that individuals with disabilities and disadvantages become valued members of our communities?

We invite family, friends and supporters to help us endow the future of PathPoint’s programs and services for thousands of individuals in 5 counties across California. With your visionary support through a legacy gift, PathPoint can continue its work serving future generations of those who need our help.

YOU CAN DO THIS BY NAMING PATHPOINT AS A BENEFICIARY OF YOUR:
• Will or Living Trust
• IRA/Retirement Pension
• Insurance Policy
• Special Needs Trust
• Charitable Remainder Trust

Planned gift opportunities like these can provide financial and tax benefits to you and your family, while helping to secure the future of PathPoint’s vital services. Be sure to consult with your attorney, tax accountant or financial advisor before deciding on the best planned gift strategy for your individual and family circumstances.

For more information or to request recommended bequest language, call our Director of Community Engagement, at 805.966.3310, ext. 1028 or e-mail Legacy@PathPoint.org. You may also visit our website at www.PathPoint.org to learn more.

A legacy commitment to PathPoint is an investment in the future of our communities.

PATHPOINT LEGACY SOCIETY

The PathPoint Legacy Society honors those who commit to a future gift of any size through their estate plans. Future gift provisions include bequests in wills and trusts, beneficiary designations in retirement and insurance plans, and irrevocable provisions in charitable remainder trusts and charitable lead trusts. You will be leaving a lasting legacy in your community!

“WE MAKE A LIVING BY WHAT WE GET, BUT WE MAKE A LIFE BY WHAT WE GIVE.”
Winston Churchill

BENEFITS OF MEMBERSHIP
• Recognition in all appropriate PathPoint publications, including the annual report, selected newsletters, and on the PathPoint website.
• Invitations to various PathPoint open houses and other special events throughout the year. In the future, there will also be a unique Legacy Society event, either a brunch or lunch.
• A special gift of recognition and appreciation.
• The satisfaction of leaving a meaningful community legacy to future generations seeking services from PathPoint.

Please let us know if you have included PathPoint in your estate plans by calling our Director of Community Engagement at 805.966.3310, ext. 1028 or Legacy@PathPoint.org

SUSTAIN PATHPOINT’S MISSION

I would like to help sustain PathPoint’s vital mission for the future:

Name ____________________________
Address ____________________________
City/State/Zip ____________________________
Phone ____________________________
E-mail ____________________________

FUTURE SUPPORT

Please send me information on how to contribute through:

☐ A bequest in my will or living trust
☐ My IRA/retirement fund
☐ A life insurance policy
☐ A Special Needs Trust
☐ A charitable trust that pays income for life

☐ I already have included PathPoint in my estate plans

Please call me to plan a gift of appreciated:
☐ Stock ☐ Bonds ☐ Real Estate

SEND TO:
PathPoint
315 West Haley Street, Suite 202
Santa Barbara, CA 93101

Email: Legacy@PathPoint.org
805.966.3310, ext. 1028 • www.PathPoint.org

THANK YOU!

“We make a living by what we get, but we make a life by what we give.”
Winston Churchill

You can do this by naming PathPoint as a beneficiary of your:

☐ Will or Living Trust
☐ IRA/Retirement Pension
☐ Insurance Policy
☐ Special Needs Trust
☐ Charitable Remainder Trust

Stock ☐ Bonds ☐ Real Estate