

Let Your Legacy Shape the Future of Oakland



**EAST BAY ASIAN LOCAL
DEVELOPMENT CORPORATION**

BUILDING HEALTHY, VIBRANT AND SAFE NEIGHBORHOODS

Mission

Emphasizing our historic and continuing commitment to Asian and Pacific Islander communities, EBALDC works with and for all the diverse communities of the East Bay to build healthy, vibrant and safe neighborhoods through community development.

Vision

We envision that everyone in Oakland and the East Bay can live in a safe, affordable home, and that every neighborhood provides opportunities that enable people to live long, healthy lives regardless of income or ethnic background.



**EAST BAY ASIAN LOCAL
DEVELOPMENT CORPORATION**

BUILDING HEALTHY, VIBRANT AND SAFE NEIGHBORHOODS

For questions or more information,
please contact:

Jill Kunishima

Director of Development and Communications

jkunishima@ebaldc.org

(510) 287-5353 ■ www.ebaldc.org

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. © Copyright MMXVIII by SHARPE newkirk. All Rights Reserved. N00X-18

Gifts That Provide Income

Your assets provide you and your loved ones with a dependable source of income. With a charitable remainder trust or a charitable gift annuity, you can make a gift to EBALDC while still providing income for life, or a period you choose, for yourself and/or those who depend on you. After your lifetime, the assets remaining become a meaningful gift to EBALDC.

Learn More!

HEALTHY NEIGHBORHOODS START WITH YOU. Thank you so much for your support, and please let us know if we can provide more information regarding the ideas in this brochure, confidentially and with no obligation.

And, if you have already included EBALDC in your estate plans, please let us know so that we may thank you personally for your commitment to our mission and vision.



**EAST BAY ASIAN LOCAL
DEVELOPMENT CORPORATION**

BUILDING HEALTHY, VIBRANT AND SAFE NEIGHBORHOODS
1825 San Pablo Ave., Suite 200
Oakland, CA 94612
(510) 287-5353

I would like more information on making a gift to EBALDC through my:

- ☐ Will(s)
☐ Living trust(s)
☐ Retirement plan(s)
☐ Life insurance policy
☐ Charitable trust
☐ Other

Name _____

Address _____

City _____

State _____

Zip _____

Phone & Email _____

- ☐ I have already included East Bay Asian Local Development Corporation in my estate plans.
☐ I would consider including East Bay Asian Local Development Corporation in my estate plans.
☐ I would prefer that my gift remain anonymous.

(For confidentiality, please return in an envelope.)

About Us

The East Bay Asian Local Development Corporation (EBALDC) is a community development organization with more than 40 years of experience in building healthy, vibrant and safe neighborhoods in Oakland and East Bay. We address the specific needs of individual neighborhoods by connecting the essential elements of health and wellbeing through our Healthy Neighborhoods Approach.

EBALDC is known for developing and managing diverse, mixed-income complexes and communities, while providing vital social and financial services, to help give long-time, low-income residents the ability to stay in their neighborhoods.

We know Oakland well and invest deeply in our neighborhoods. We recognize and build upon the assets unique to each community to inform and establish thoughtful partnerships that will address the social factors impacting a neighborhood's health and wellbeing.

This comprehensive perspective helps families and individuals begin a path toward healthy, stable and fulfilling lives in a holistic, sustainable way.

A Legacy of Health and Wellbeing for All

Bequests and other estate gifts provide vital support for EBALDC and our ability to serve and house thousands of Oakland and East Bay residents every year.

By including EBALDC in your estate plans, you ensure our long term ability to build

healthy, vibrant and safe neighborhoods in Oakland and the East Bay.

EBALDC continues to innovate in the affordable housing space, as it has since 1975. Legacy gifts will have a lasting impact on our community, especially as homelessness and displacement threaten so many. With your help, EBALDC will remain at the forefront of this critical work.

There are several ways to support EBALDC in your plans. Read on to learn more.

Gifts by Will or Trust

Your will or living trust can provide for your loved ones and also ensure your charitable goals are met. Charitable bequests can be the residue of your estate (what's left after other bequests are made), a specific dollar amount, percentage of your estate or even a certain piece of property, such as your home. If you want to add a gift to your existing will or trust, speak to your attorney about a simple amendment, called a codicil.



Sample Bequest Language

We have sample bequest language for many types of gifts. The following is for an unrestricted gift in your will or trust:

"I give _____* to the East Bay Asian Local Development Corporation, a California nonprofit public benefit corporation, to provide support for the organization and for its programs and services."

**For example, "\$_____" or "_____% of the residue of my estate."*

Gifts from Retirement Funds and Insurance Policies

With a beneficiary designation form (obtained from your plan administrator or insurance company), you can name EBALDC to receive all or a portion of any assets remaining in your retirement account or name us the beneficiary of a life insurance policy — it is a simple way to make a significant gift.

Here are some advantages:

- You do not have to change your will (or meet with your attorney) to arrange for these gifts.
- Your estate could benefit from tax savings.
- You may be able to make a more significant gift than you ever expected!

Gifts of Property

Giving real estate, stocks, bonds, mutual funds or other property that has increased in value over the years is a smart way to support EBALDC and may result in significant tax savings.

Selling appreciated property can trigger capital gains tax. However, if you use these assets to make a charitable gift instead, you may be able to reduce — or even completely avoid — capital gains tax and also claim an income tax deduction based on the full value of the property.

