

By implementing a planned gift to the Friends of the Delaware Canal Legacy Fund, you will become part of a long and admirable tradition of coming together to ensure that the Delaware Canal is preserved and will continue to share its history and natural assets in even better ways.



There are a variety of planned giving options that can fulfill your financial goals and foster the long-term sustainability of the Friends, its mission and services. The kinds of gifts that you can make include:

Outright gift of cash, marketable securities, or real estate.

Contributing appreciated assets creates current income tax savings and possible capital gains savings.

Gift from a tax-deferred retirement plan

Naming the Friends of the Delaware Canal as a beneficiary of your IRA, 401(k) or qualified plan is simple and convenient. This can normally be done through the custodian without the need for complicated paperwork. It can also achieve greater tax efficiency for these fully taxable funds.

Bequest in your will

A bequest makes possible a substantial charitable gift in memory of an individual and creates estate tax savings.

Gift of a life insurance policy

Contributing an existing policy and possibly annual gifts to cover premiums or naming the Friends in a new policy makes possible a large future gift and possible current and future income tax savings.

To learn more about how you can help assure the future of the Delaware Canal and its Friends, please contact

Susan Taylor at 215-862-2021 or e-mail friends@fodc.org.

Note: The material presented is not offered as legal or tax advice.



THE DELAWARE CANAL

RETAINED, SUSTAINED, MAINTAINED
FOR 180 YEARS, BECAUSE WE CARE.



FRIENDS OF THE DELAWARE CANAL

(215) 862-2021  friends@fodc.org  www.fodc.org



FRIENDS OF THE DELAWARE CANAL

Mission Statement

The Friends of the Delaware Canal is an independent, non-profit organization working to restore, preserve, and improve the Delaware Canal and its surroundings. Our primary goals are to ensure that the Canal is fully-watered from Easton to Bristol and that the towpath trail is usable over its entire length.

We embrace this mission in order to sustain a unique link to our heritage, protect beautiful and diverse natural area, provide educational and recreational opportunities, and enable the Canal to serve as a community and economic asset.

~ The Legacy Fund ~
An endowment fund to ensure
the Canal's future

BECOME A MEMBER OF
THE FOUNDER'S CIRCLE

A recognition society of contributors to the Friends of the Delaware Canal Legacy Fund.

The Founder's Circle was established to recognize and honor those individuals who have provided for the future of the Canal through a bequest or other planned gift. Membership is generally reserved for those who have contributed or committed to a gift of \$5000 or more. Members are invited to a Founder's Circle Reception and can be listed in the annual recognition issue of *Canal News* and on the Friends' website.

Please let us know if you qualify as a member of the Founder's Circle. It is the commitment rather than the amount that is the basic factor in qualifying as a Founder's Circle member.

You may qualify as a member in the following ways:

- Make an outright gift of cash, securities, or real estate to the Friends.
- Name the Friends as a beneficiary of your IRA, 401(k), or other qualified plan.
- Make or revise your will directing a bequest to the Friends of the Delaware Canal.
- Name the Friends as a primary or secondary beneficiary or owner of a new or existing life insurance policy.

Friends of the Delaware Canal Legacy Fund

Love the Delaware Canal now ~ Help assure its future by supporting the Friends of the Delaware Canal, the community of people who care.

The purpose of the Legacy Fund is to provide a sustainable and reliable source of additional income to support the mission and activities of the Friends in perpetuity.

It shall be the sole repository of all funds received by the Friends of the Delaware Canal as gifts, bequests, or proceeds realized from the sale or disposition of non-cash items received and intended for the Legacy Fund.

The Fund is wholly comprised of Vanguard money market and stock and bond index funds in accordance with the Investment Guidelines. These Guidelines provide for a portfolio allocation of 60% Equities and 40% Fixed Income and Cash.

Our Use and Withdrawal Policy permits withdrawal and use only of investment growth and income generated from the Fund, up to a maximum of 5% of the Fund value each year.

It is the desire of the Friends of the Delaware Canal that all funds be invested productively, but safety of principal is a primary consideration.

Prudent oversight of charitable gifts is the fiduciary responsibility of the Friends' Board of Directors.

"It is a privilege to support the Friends and the future of this marvelous public resource through endowment of the Legacy Fund by direct contribution as well as inclusion as an IRA beneficiary in our estate planning."

Peter and Barbara Sperry – Members of the Founder's Circle

"I heartily support the efforts of the Friends of the Delaware Canal because, in today's hectic world, I appreciate the Canal's serenity and beauty and find it a wonderful place to reconnect with our past."

Bill Farkas – Member of the Founder's Circle

FOR MORE INFORMATION OR TO BECOME A MEMBER, PLEASE CONTACT SUSAN TAYLOR.

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