Leave a Legacy with Parkinson Community Fitness

A planned gift is a way to support Parkinson Community Fitness (PCF) as part of your long-term financial and estate planning. These gifts can often be made without affecting your current finances, while ensuring that future generations continue to benefit from movement, strength, and community.

Planned giving allows you to:

- Extend your impact beyond your lifetime
- Support a cause you care about in a meaningful way
- Potentially receive tax benefits
- Make a gift that reflects your values and legacy

Option 1: Name PCF as a Beneficiary of Your IRA or Retirement Account
Retirement accounts such as IRAs, 401(k)s, and 403(b)s are often among the most tax-efficient assets to leave to charity. Because PCF is a nonprofit organization, it does not pay income tax on distributions, meaning 100% of your gift supports the mission.
You can name PCF as:

- 100% beneficiary, or
- A percentage beneficiary (for example, 10%, 25%, etc.)

This is done through a simple beneficiary designation form from your account custodian.

No will or trust amendment is required.
Sample Beneficiary Designation:
Beneficiary Name: Parkinson Community Fitness
EIN: 83-0957246
Address: Parkinson Community Fitness. P.O. Box 8805, Blue Ash Ohio 45242
Designation: ____ % Primary / Contingent Beneficiary

Option 2: Leave a Gift in Your Will or Trust
You can include PCF in your estate plan through a bequest in your will or revocable living trust.

Specific Dollar Gift
A specific dollar gift directs that a fixed amount goes to PCF (for example, $10,000).

Sample Will or Trust Language – Specific Dollar Gift:

I give the sum of $__________ to Parkinson Community Fitness, EIN 83-0957246, or its successor organization, to be used for its general charitable purposes.

Percentage or Residuary Gift
Instead of a fixed dollar amount, you may leave a percentage of your estate (for example, 10%) or a share of the residue which is what remains after debts, expenses, and other gifts are paid. A residuary gift adjusts naturally with the size of your estate.

Sample Will or Trust Language – Residuary Share:
I give ______ percent (___%) of the rest, residue, and remainder of my estate to Parkinson Community Fitness, EIN 83-0957246, or its successor organization, to be used for its general charitable purposes.

Option 3: Lifetime Giving Through Your Financial Power of Attorney
A Durable Financial Power of Attorney allows someone you trust (your "agent") to manage finances if you unable due to your mental or physical incapacity. Most standard powers of attorney do not automatically allow charitable gifting. Adding specific language ensures your support for PCF can continue even if you become incapacitated.

Sample Power of Attorney Language – Based on Past Giving:
My Agent is authorized to continue my pattern of charitable giving, including gifts to organizations I have supported during my lifetime. This specifically includes authority to make gifts to Parkinson Community Fitness (EIN 83-0957246) in amounts consistent with my historical practices and financial ability.

Sample Power of Attorney Language – Fixed Annual Amount:
In addition to any other gifting authority granted herein, my Agent is specifically authorized to make charitable gifts to Parkinson Community Fitness (EIN 83-0957246) in an amount not to exceed $________ per calendar year, provided such gifts are consistent with my overall financial well-being and care needs.

Sample Power of Attorney Language – Percentage of Income:
My Agent may make annual charitable gifts to Parkinson Community Fitness (EIN 83-0957246) of up to _____% of my annual income, so long as such gifts do not impair my ability to provide for my health, support, and maintenance.

Important Note
We encourage you to consult your attorney, financial advisor, or tax professional when making estate or beneficiary designations. If you have already included PCF in your plans, we would love the opportunity to thank you.

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