



DUBOIS COUNTY
Community Foundation

Gifts of Life Insurance

A gift of a new or existing life insurance policy to Dubois County Community Foundation can provide:

- a way to make a significant gift at a relatively low cost
- income tax benefits if the Dubois County Community Foundation is both owner and beneficiary of the policy
- flexibility and continued security for family members if the foundation is named a contingent beneficiary or one of several beneficiaries, if you keep ownership of the policy
- a reduction in estate taxes

How It Works:

- You transfer ownership and beneficiary designation of the policy to Dubois County Community Foundation.
- Donor continues to pay premiums (if any) to the foundation or simply make the foundation a beneficiary or contingent beneficiary of an existing policy.

To learn more about making a Planned Gift, please call the Community Foundation at 812.482.5295. Confidential consultation on estate planning with Community Foundation staff or board experts is available at all times.

Note: The information and suggestions provided in this information sheet are not intended as legal advice. All gift options should be discussed with legal, tax or estate-planning advisors.