



Perpetual Income Plan for Your Organization

A legacy that keeps giving to [Your Organization]

To cover expenses, [Your Organization] **could have** an income base that **continually** gets restored!

What if...

- You could diversify part of your endowment into multiple investments and/or guaranteed options?
- You could withdraw 4% to 6% annually to covering operating expenses?
- And... after using all that money for operating expenses (year after year), when your plan designee dies, your original investment (or more) is restored as a death benefit to [Your Organization]?

Here's an example:

- 1) [Your Organization] invests/transfers \$2,000,000
- 2) [Your Organization] withdraws \$100,000 (5%)
- 3) [Your Organization] uses the \$100,000 to cover specific operating expenses

- 4) [Your Organization] repeats step 3 annually for the next 15 years (withdraws \$1,500,000)
- 5) Plan designee then dies...
- 6) Plan designee's death benefit is then restored to the greater of the account value, or the total investment (\$2,000,000)
- 7) [Your Organization] receives the death benefit
- 8) [Your Organization] selects another plan designee and repeats steps 1 - 7

What does [Your Organization] have to do?

1. We meet with your people in charge (in person or over ZOOM)
2. All questions are answered, particular to [Your Organization]'s needs.
3. You choose a plan designee or multiple plan designees.
4. We implement the plan at ZERO cost to [Your Organization].

Interested in knowing more?

Contact us at:

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