



Gifts in Wills and Other Legacy Gifts: Fund a Healthy Future for All



Why Include a Gift to Project HOPE in Your Estate Plan

For 65 years, Project HOPE has transformed the health and well-being of people and communities around the world. We work on the front lines of the world's health challenges, partnering hand-in-hand with communities, health workers, and public health systems to ensure sustainable change.

And our work is more critical than ever.

Climate change, war, pandemics, and natural disasters have no borders: they impact everyone.

During emergencies, the number of lives lost—or saved—depends greatly on the quality of health care providers, the speed of response, and the resilience of health care infrastructure.

Project HOPE acts fast to respond to acute emergencies while ensuring systems are stronger for the next time disaster strikes.

When every second counts, a gift in your will ensures that health care workers have the training support they need to save lives.

A gift in your will or living trust, or through a beneficiary designation:

- Requires no immediate donation, and you can change your mind at any time and for any reason.
- Can name Project HOPE as a secondary or contingent beneficiary, so we only get your gift if you outlive your other primary beneficiaries.
- Is welcome in any amount.
- Provides critical support in communities close to home and around the world.

Photo (top): In Ukraine, Project HOPE has launched 11 mobile medical units (MMUs) to provide primary health care in the Dnipro, Zaporizhzhia, and other areas.

The Legacy of HOPE Society

With a gift in your will or other estate plan, you become a member of the Legacy of HOPE society. Through their gifts, this special group of givers demonstrate their commitment to provide people around the globe with HOPE for the future.

If you include a gift to Project HOPE in your will or other estate plan, we hope you will let us know.

Sharing your future wishes doesn't imply any obligation. **We will never ask for details you don't want to share, and we believe strongly that you should always be free to change your mind.** Our gratitude for your consideration will always remain.

When you support our work, this mission becomes part of your enduring legacy. With your help, we will:

- Ensure that power resides in the hands of local health workers, saving lives around the world.
- Avoid preventable deaths of mothers and newborns.
- Stop the spread of infectious diseases and lower the risks of chronic diseases.
- Help communities hit by disasters and strengthen health care systems to withstand future disasters.
- Advance research and data to shape health policy that can lift up entire communities.

Creating or updating your will and your beneficiary designations doesn't have to be complicated:

- Think about your loved ones and causes you'd like to support.
- Update your beneficiary designations on your financial accounts.
- Create a will that reflects your wishes and priorities.
- Feel the peace of mind that comes with knowing your loved ones and favorite causes will be taken care of.

Simply contact your attorney or advisor to discuss the best way to update your plan.

A Gift in Your Will or Living Trust

There are several ways to include a gift to Project HOPE in your will or living trust. Your attorney can help you determine the best way to make your gift. Some options:

- You can leave a small percentage of your estate—even 1% can make a real difference!
- You can leave a defined sum to Project HOPE.
- You can leave a percentage of funds left over after other gifts and debts are paid and your loved ones are provided for.
- You can make a secondary or contingent gift that comes to Project HOPE only if your other beneficiaries do not survive you or other specific gifts cannot be fulfilled.

Project HOPE suggests this simple language for your will, codicil to your will, or your living trust:

I give [description of gift] to Project HOPE, The People-to-People Health Foundation, a nonprofit organization with Federal Tax ID #53-0242962, for its general use and purpose."

Gifts by Beneficiary Designation

You can name Project HOPE as a partial or total beneficiary of your:

- Retirement accounts, including your IRA, 401(k), 403(b), or another tax-deferred plan.
- Life insurance policy, if it's outlived its original purpose and you no longer need the policy.
- Donor-Advised Fund (DAF), updating your account succession plan to gift funds remaining in your DAF account after your lifetime.
- Other financial accounts, including your bank and brokerage accounts.

As with gifts in your will, you can designate all or a percentage of the funds in your account, and you can name Project HOPE as a primary beneficiary or a second-in-line beneficiary. And, of course, you can change your mind at any time.

Simple steps to make a gift by beneficiary designation:

- Contact your retirement plan administrator, insurance company, bank, or financial institution for a change-of-beneficiary form. You may be able to request or download your form from your online account portal.
- Be sure to include our legal designation:

The People-to-People Health Foundation
Federal Tax ID #53-0242962

Please let us know. Some financial institutions will not notify us after your lifetime that we are a beneficiary, but sharing your wishes now helps ensure your gift will be distributed as you wish. We will always keep your information confidential, and you can update your plans at any time.

Charitable Gift Annuities

A charitable gift annuity provides fixed payments for life in exchange for a gift of cash or securities to Project HOPE. Gift annuities are easy to set up and the payments you receive are backed by the general resources of Project HOPE. Rates recently increased and now go up to 9.7%.

How it works:

- Donate cash or securities worth \$10,000 or more to Project HOPE.
- Your payment rate is based on your age, and will never change, no matter how long you live or how the market fluctuates.
- Make your gift by December 31 and you may be able to reduce your current year tax burden. If you fund your gift with appreciated securities, you will avoid a significant amount of capital gains taxes.
- You must be age 65 or older to receive payments.

Under the Secure 2.0 Act, you may be able to make a qualified charitable distribution (QCD) from your IRA to fund a charitable gift annuity. Please contact us to determine if you qualify and if this gift is right for you.

Charitable Remainder Trusts

A charitable remainder trust (CRT) can provide you and/or other beneficiaries with income for life or for a fixed number of years. Many people prefer to use real estate to fund a CRT, but you can also donate cash or appreciated securities.

For your donation, you receive an immediate income tax deduction for a portion of your contribution to the unitrust and savings on capital gains taxes, too. You will also have the satisfaction of making a significant gift that benefits you now and Project HOPE later. With this type of gift, you may be able to:

- Avoid paying capital gains on sales of appreciated stock and real estate
- Give up the stress of being a landlord, while retaining a lifetime income stream
- Receive a significant charitable income tax deduction
- Remove assets from your taxable estate

Other Ways to Give

There are a number of tax-smart opportunities available to you. These include qualified charitable distributions from your retirement plans, gifts from your donor-advised fund, gifts of appreciated securities and more.

Visit [<Ways to Give>](#) to learn more.

Our Promises

Project HOPE is committed to maintaining the highest standards of ethics and continuing to be worthy of your legacy support.

- We will never pressure you to make a gift or require you to share more details than you are comfortable sharing.
- We will respect your privacy.
- We will respect your right to change your plans.
- We promise to use your gift the way you intend.

At Your Service

If you have any questions about how to make a gift in your will or trust or by beneficiary designation, or would like information about charitable gift annuities or other ways to support Project HOPE, please be in touch.

Our gift planning staff is ready to answer your questions and assist you in any way.

Telephone: 1-800-544-4673

Email: giftplanning@projecthope.org

Mail: Leadership and Legacy Team, Project HOPE
1220 19th St, NW, Suite 800, Washington, DC 20036

Our Mission

Project HOPE places power in the hands of health workers to save lives across the globe.

We work in five main areas:

- Disasters, health crises, and complex humanitarian emergencies
- Pandemic preparedness and response
- Infectious and noncommunicable diseases
- Maternal, neonatal, and child health
- Health policy



Angelika's mom shares: "I'd like Angelika to go to study and to grow up to be a healthy girl — and to have everything I didn't have. Luisa has helped me very much. Since I was pregnant, she has visited and supported me, all in service of our health, mine and my baby's." **Gifts in wills ensure children like Angelika can look forward to a healthy future.**

"I see the sadness parents feel when they see their babies here in the incubators... and I see the light when I see them get to leave the hospital with their babies in their arms. It's like giving the gift of life. Without the right equipment, most of these babies would die." Dr. Sanchez, Maternity San Lorenzo de Los Mina Maternity Hospital. **Gifts in wills help Project HOPE provide critical equipment to save the lives of these littlest babies.**



This information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only. California residents: Gift Annuities are subject to regulation by the State of California. Payments under such agreements, however, are not protected or otherwise guaranteed by any government agency or the California Life and Health Insurance Guarantee Association. Oklahoma residents: A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department. South Dakota residents: Charitable gift annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.