TESTAMENTARY GIVING

Build future giving into your estate plan

By naming an NCF Giving Fund as a beneficiary in your estate plan, you can continue your charitable impact beyond your lifetime.

Benefits of testamentary giving

With NCF, testamentary giving is more than a beneficiary designation. It connects your estate plan to a charitable plan that reflects your values and helps your giving continue with purpose.

Fund a legacy of generosity

Name your Giving Fund in your estate plan, so your generosity can continue after your lifetime.

Adapt your plan as life changes

Update your Giving Fund succession plan without revising estate documents.

Increase impact with potential tax efficiencies

Testamentary giving may help reduce taxes, preserving more for charitable giving.

Fund charities that align with your purpose

Grants from your fund go to charities reviewed by NCF, aligned with your values.

When to consider testamentary giving:

- You want to integrate charitable giving into your estate plan
- You want your charitable giving to continue after your lifetime
- You want flexibility to update your giving plan over time
- You're exploring ways to reduce potential estate taxes while increasing charitable impact

NCF | TESTAMENTARY GIVING

How it works

Testamentary giving is designed to work in partnership with your estate plan. After your estate is settled, NCF distributes assets according to your succession plan, helping you fund a legacy of generosity.

Name your Giving Fund in your estate plans

Work with your attorney or advisor to designate your NCF Giving Fund as a beneficiary in your will or other estate documents by completing and including the following paragraph:

National Christian Charitable Foundation, Inc. (TIN# 58-1493949, 1150 Sanctuary Pkwy, Suite 350, Alpharetta, GA 30009) or one of its affiliated ministries (including but not limted to NCF Charitable Assets Trust), as may be determined by NCF, subject to applicable governing instruments, policies, and procedures, as amended from time to time. This distribution is designated for The ___________________ Giving Fund (#__________).

Share your plans with NCF

Let your NCF team know about your intentions, so we can help prepare for future implementation.

Create or update your succession plan

Document how you would like your Giving Fund balance to be granted or distributed after your lifetime. You can update your plan as your family, priorities, or charitable interests change.

Disclaimer-funded Giving Fund option*

This creative strategy gives your estate beneficiaries (children, grandchildren, etc.) the ability to disclaim some or all of their inheritances within nine months following your death, in which case the money goes to their Giving Fund. To the extent that a beneficiary exercises this disclaimer, the value properly disclaimed may not be subject to income or estate taxes.

*NCF strongly urges that you consult with your attorney, financial advisor, insurance agent, and/or tax advisor to review and approve this complimentary educational information. This information in no way constitutes legal advice. It is intended to be broadly educational in nature with reference to information you have shared concerning your situation. We will gladly work with your independent advisors to assist in any way.

The NCF difference

Planning your charitable legacy can feel like a daunting task with all the tax and legal considerations. NCF has been walking alongside families with their charitable legacy giving for more than 40 years. Our team works with you and your advisors to connect your estate plan to your giving intentions and help your generosity continue beyond your lifetime.

Learn more →
ncfgiving.com/charitablelegacy