

RETIREMENT FUNDS

If you no longer depend on your retirement funds to assure your financial security, you may want to make a legacy gift. Since IRAs and pensions are often the most heavily taxed assets in an estate, they are ideal for charitable gifts.

The procedure is simple. Obtain a “Change of Beneficiary” form from your retirement fund administrator, and name the San Diego History Center as the full or partial beneficiary. And using other assets for gifts to your family, you can make a sizeable charitable contribution while still providing for your loved ones.

To learn more about making a gift of retirement funds, please contact the Development Department at development@sandiegohistory.org or 619-232-6203 x102.