



Habitat
for Humanity®
Greater Orlando &
Osceola County

Legacy Builders

Legacy Builders are those individuals who have graciously chosen to include Habitat for Humanity Greater Orlando & Osceola County in their estate plans through a bequest, charitable trust, charitable gift annuity or other means.

We'll personally work with each Legacy Builder to establish their desired philanthropic goals. It's a gift of immeasurable kindness and consequence, capable of helping countless individuals and families find comfort in a place they call home.

Wills and Family Trusts

Your estate plan can provide you with a variety of ways to help build homes for low-income families in need.

In your will, you may decide to leave Habitat for Humanity Greater Orlando & Osceola County:

- A specific sum of money
- A percentage of your estate
- All or part of your residual estate, or what's available after loved ones have been provided for

A gift in your will is a way to create a meaningful memorial that will help families avoid the indignity of poverty housing. Simply ask your attorney to include a bequest in your will to:

Habitat for Humanity Greater Orlando & Osceola County
4116 Silver Star Road
Orlando, FL 32808
Tax ID Number: 59-2789167

Gift Annuities

A gift annuity - whether funded with cash or stock - provides a handsome cash flow and a variety of benefits. If you transfer your stock to the gift annuity, you can significantly reduce the capital gain, as well as spread the rest of it out over a number of years. Additionally, any balance remaining after your passing will be used to help build a home for a Habitat Orlando & Osceola family.

Gift of Stock

You can also choose to transfer shares of long-term appreciated stock you won't need directly to Habitat for Humanity Greater Orlando & Osceola County. You receive a full tax deduction for the entire market value, avoid the capital gain and help to create a world where everyone has a safe and affordable place to live.



Minimum IRA Distribution after Age 70½

Are you required to take money you don't need from your IRA accounts each year just to pay the taxes on it? If so, you can both help a deserving family purchase an affordable home and possibly ease your tax burden. Simply transfer the exact amount as your required IRA distribution to Habitat Orlando & Osceola and, if you itemize, you may be able to eliminate some or all of your tax liability on the transaction.

Life Insurance Policies

Many families own life insurance policies that have outlived their original purpose and can also trigger estate taxes if not treated with care. For many of our Legacy Giving supporters, these unnecessary policies have been used to build a new life for a Habitat Orlando & Osceola family.

In addition, a new life insurance policy can be used to realized the dream of making a large, impactful donation to Habitat Orlando & Osceola.

If any of these Legacy Giving options are of interest to you, or if you have questions, please reach out to our President and CEO, Catherine McManus, at (407) 440-6976 or cmcmanus@habitorlandoosceola.org.

This information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.



Habitat for Humanity Greater Orlando & Osceola County is part of a global, nonprofit housing organization dedicated to eliminating substandard housing through constructing, rehabilitating and preserving homes, as well as advocating for fair and just housing policies and providing families with training and access to life-changing resources.

(407) 648-4567 | habitorlandoosceola.org | 4116 Silver Star Rd., Orlando, FL 32808