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Thank you for your CFC pledge to Walking Shield, Inc
CFC # 82455

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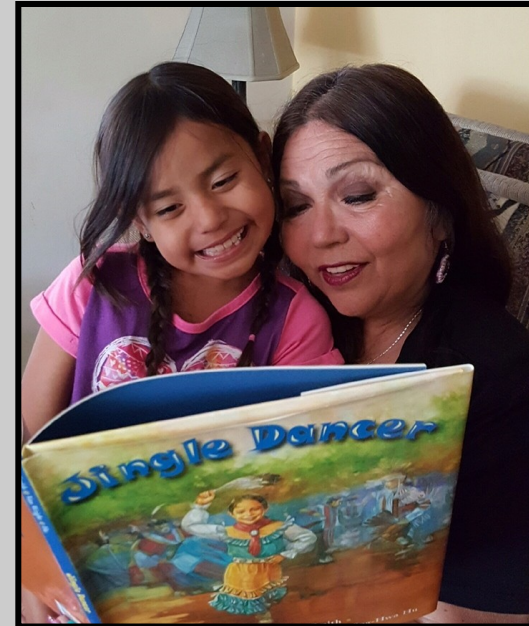
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Planned Giving...
*Be Remembered for
Making a Difference*



Walking Shield, Inc.
Serving American Indian Families Since 1986

Our Mission

Walking Shield is a 501(c)(3) non-profit organization. Since 1986, our mission has been to improve the quality of life for American Indians through programs that provide shelter, healthcare, community development support, educational assistance, and humanitarian aid.



Our Programs

The **Medical/Dental Support Program** has provided more than 135,000 American Indians with invaluable healthcare services through military health personnel deployments.

The **Infrastructure Support Program** has developed over 900 miles of roads, drilled dozens of water wells, and installed several miles of new sewer and water lines to improve infrastructure conditions on Indian reservations.

The **Housing Relocation Program**, has relocated over 1,225 excess military housing units to reservations in the states of Montana, North Dakota, South Dakota, Minnesota and Nevada.

Did you know that over 55% of American adults do not have a will?

So, for those who don't or for those who wish to change beneficiaries, it's a good time to ensure that your estate and assets are distributed according to your desires.

Planned Giving is a great way to secure your assets, benefit financially and make a difference to those in need.

There are many planned giving options, among them one that will suit both you and Walking Shield.

Walking Shield and the American Indian community greatly appreciate your support and consideration.

Contact Walking Shield at (949) 639-0472 to learn more. We will be glad to help you in deciding on the best planned giving option.

Walking Shield would like to extend a special thank you to the Orange County Community Foundation for their support.





A Native American child receiving the gift of sight at a OneSight vision clinic.

Current Outright Gifts

Current outright gifts include stock, real estate and personal property. These gifts can be sold by Walking Shield and transferred to a monetary value.

The Benefits

- The donor makes a difference through their generous donation to Walking Shield.
- The donor receives a charitable income tax deduction for their gift and does not have to pay a capital gains tax if the item has appreciated when sold by Walking Shield.

The **Education Program** supports American Indian students and their families with college scholarships and other assistance to help them reach academic and professional goals.

The **Humanitarian Aid Program** provides thousands of items such as clothing, blankets, school supplies and food to families every year.

The **OneSight Partnership** provides thousands of vitally needed free eye exams and glasses to American Indian children and adults in inner cities and rural reservations

The **Holiday Gift Program** distributes thousands of brand new toys and other items to needy children each holiday season.

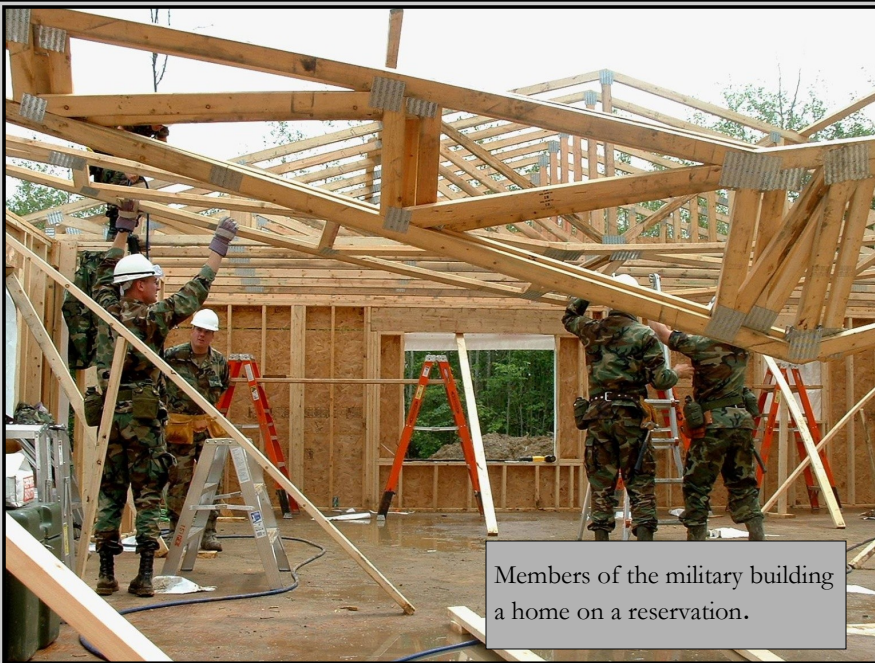


A member of the military providing dental x-rays for a child on a reservation.

What is a planned gift?

A planned gift anticipates the donor's future circumstances and is often made during retirement or estate planning.

Planned gifts are beneficial not just to Walking Shield, but to the donor as well. Planned gifts give the donor income and tax benefits. There are several planned gift options. The donor should choose the option that best balances what they wish to accomplish for themselves, their family and Walking Shield, as their nonprofit interest, in their overall estate and financial plans.



Members of the military building a home on a reservation.



Native American youth receiving backpacks and school supplies.

Charitable Lead Trust

A charitable lead trust receives cash or property from a donor and makes payments to Walking Shield for a specified period. At the end of the period, it distributes the trust property to a specified beneficiary. The payment can be either a fixed annuity amount or an available unitrust amount.

The Benefits

- The donor is able to give a gift to Walking Shield and pay as little gift or estate tax as possible.
- The cash and/or property in the trust will be distributed to the donor's family or to the donor themselves at the end of the specified period with growth and without any additional tax.
- The donor receives a current federal gift or estate tax deduction for the present value of the payments that will go to Walking Shield.

Charitable Gift Annuities

A gift annuity is an agreement between the donor and a charity that in exchange for a gift, the charity will provide a life-time fixed income stream to one or two donors based on annuitants' life expectancy.

Walking Shield has partnered with The Orange County Community Foundation (OCCF) to provide this planned giving option. OCCF has been licensed to issue charitable gift annuities by the California Department of Insurance. OCCF will be responsible for making lifetime payments to you and giving an immediate grant to Walking Shield representing the present value of what is anticipated.

*Note, although regulated by the California Department of Insurance, charitable gift annuities are not insured or guaranteed by the California Insurance Guaranty Association. Instead, the lifetime payment is secured by the assets of the OCCF.

The Benefits

- The donor is able to make a gift to Walking Shield and receive regular payments to supplement income. The fixed payments can be to one or two individuals for life.
- The donor receives tax benefits. A portion of each gift annuity payment to the donor is tax-free. The donor receives a current federal income tax deduction for the present value of the gift to Walking Shield.

Planned Gift Options



A housing unit being transported to a reservation.

Bequest

A bequest is a gift to charity at death. It can be included in the donor's will or trust. The bequest can be a specific asset, a specific monetary amount, a percent of the residue, such as a certain percent of the residue of an estate, or the undivided percentage of an asset.

The Benefits

- The donor makes a difference by donating to Walking Shield.
- The donor is able to keep ownership and use of their property while alive.
- The donor receives tax benefits. The amount donated to Walking Shield is not subject to federal estate tax.

Life Insurance Expectancies

A life insurance expectancy is when a donor makes Walking Shield the beneficiary of an existing or new life insurance policy. Upon the donor's death, Walking Shield receives all or a portion of the proceeds from the policy.

The Benefits

- The donor is able to donate to Walking Shield without having an out of pocket expense.
- The donor has the option of removing Walking Shield as the beneficiary before death.
- The donor receives a charitable income tax deduction equal to the cash surrender value of the property and any future premiums.

Retirement Plans and IRA Expectancies

Retirement plan and IRA expectancies involve making Walking Shield a beneficiary of either a retirement plan or an IRA. Walking Shield is named a beneficiary of the plan's assets upon the owner's death.

The Benefits

- The donor is able to donate to Walking Shield without having any out of pocket expense.
- The donor has the option of removing Walking Shield as the beneficiary before death.
- The donor receives tax-savings as much as 75 cents on the dollar.



Native American high school students receiving college scholarship awards.

Charitable Remainder Trust

A charitable remainder trust is when a donor transfers cash or property into a trust. The donor receives payment from the trust for a set amount of years or until death. When the trust ends, the remainder of the trust is distributed to Walking Shield. There are two payment options for the donor. Charitable remainder annuity trust is when a donor chooses to receive a fixed annual payment. Charitable remainder unitrust is when a donor chooses to receive an amount equal to a percentage of the trust value at the beginning of each year.

The Benefits

- The donor continues to receive income from the trust and donates the remainder to Walking Shield.
- The donor can name others as additional income beneficiaries.
- The trust sells property tax-free.
- The donor receives a current federal income tax deduction.