



Community Foundation  
of Eastern Connecticut

**A Philanthropic Guide**



Your Life.  
Your Legacy.



You can't live forever,  
but your generosity can.

The Community Foundation of Eastern Connecticut is one of the largest grantmakers and scholarship providers in Eastern Connecticut. We award millions annually to outstanding nonprofit organizations tackling the most pressing issues in the towns we serve. And each year, we award hundreds of scholarships to local college students. Many of these grants and scholarships are possible because of caring donors who made bequests to the Community Foundation.

**Over the last four decades**, the Community Foundation of Eastern Connecticut has partnered with generous people like you to support and sustain the communities we all love. Each donor created or built upon existing charitable funds at the Community Foundation or entrusted us to direct their gifts where most needed. We invite you to experience the joy of giving back to your community, too.

**As your community foundation, we're here for you** on your giving journey. You can count on us to be your trusted partner to provide the expertise, tools, and philanthropic strategies to meet the evolving challenges and opportunities facing our region's residents.


**We hope you find this guide helpful** as you thoughtfully consider your philanthropic legacy and estate plan. We have included several stories from your Eastern Connecticut neighbors to inspire you.

**You'll find a range of charitable giving options** available through the Community Foundation. Each can provide lasting benefits to the region's residents long after your lifetime... *forever, in fact!*

**And may this guide empower you to "bend the arc of generosity toward justice."** Our region, like our country, is a place where inequities are painfully evident. Together with you, we seek to transform our region — through philanthropy, advocacy and systems change. The aim: to remove barriers so all residents of Eastern Connecticut have the same opportunities to thrive.

**Turn the page. Take the first step in creating your legacy** — and help your community forever.





## Ready to Leave Your Legacy in the Communities You Love?

### TAKE THE FIRST STEP

By including the Community Foundation in your will or estate plan, you become a member of a very special group of caring people — our Legacy Society.

Like you, Legacy Society members have meaningful roots in this region.

Many have raised their families here. Or vacationed, year after year, on our tranquil shoreline. Celebrated milestones with their faith communities. Shared picnics with neighbors on warm summer evenings. Attended one of our many superb schools.

**Legacy Society members have decided to give back to the communities they love. Will you?**

It's easy!

- > When you include the Community Foundation in your estate plan, you choose the issues you care most about. Healthy activities for children. Advocacy for cleaner air and water. Better health care access. Affordable higher education. Safer spaces. More inclusive communities. *You* decide.
- > After your lifetime, we put your gifts to work through grants to local organizations that are effectively tackling the issues that are important to you.
- > Your gifts will be wisely invested by our professional advisors to sustain the impact of your giving for years to come.

### Meet Some of Our Legacy Society Members

Our Legacy Society honors those who have included the Community Foundation in their estate plans. Through bequests, charitable trusts, gift annuities, retirement fund assets, and other planned gifts, Legacy Society members support causes close to their hearts.

On the following pages, learn what inspired a few of them to do good in the communities they love — forever. >>>



## Sandy's Story

### THE ESTHER SLOAN MITCHELL FUND FOR WINDHAM WOMEN AND GIRLS

Sandy and Stan Hale met while working in Hawaii, but they chose Windham in which to put down roots nearly 50 years ago when Stan established his medical practice.

Sandy loved the area for its wonderful parks and rivers, interesting people, and storied milling history. And she loved her job as a nurse practitioner providing reproductive health care to women and girls.

In the 1980s, the steep rise in teen pregnancy moved Sandy to try to understand young mothers' lives more deeply. She took up her camera to photograph and listen to them and document their reflections. She later published a book that illuminated the dreams and motivations of ten young mothers.

She found that many girls couldn't fathom a future for themselves. Self-worth ebbed with their family's incomes. "Most of the girls were just looking for acceptance and love and wanted to accomplish something in life," recalled Sandy. Pregnancy seemed like the answer. It often wasn't.

A friend introduced Sandy to the fledgling steering committee for the Community Foundation's Windham Women & Girls Fund. She jumped at the chance to join.

With collective wisdom, the group directs grants from the Fund to local nonprofits, giving Sandy a meaningful way to bolster the resources, strength, and confidence of the women and girls she so cherishes. The grantee organizations provide programs from legal aid to summer camps... and beyond.



*Above: Sandy as a child, with her mother Esther Sloan Mitchell.*

But Sandy's commitment to women and girls hasn't stopped there. The Hales also established the Esther Sloan Mitchell Fund for Windham Women and Girls at the Community Foundation.

The Fund's name memorializes Sandy's mother. "She was an unsung heroine to me — a homemaker with five children who was such a caring person," she said. "I wanted her name to be remembered beyond me."

And it will. The Esther Sloan Mitchell Fund will forever provide grants to organizations strengthening the lives of Windham's women and girls.

## John's Story

### THE JOHN AND LEE PRITCHARD FUND

John Pritchard first became captivated by Lyme when visiting friends there decades ago.

He observed, "Lyme is largely rural and wooded, it has beautiful fields, and it borders the marshland of Lord Cove — the estuary of the Connecticut River — which The Nature Conservancy many years ago identified as one of the '40 last great places on earth.' It's also an incredible nursery for all kinds of fish and wildlife."

John and his wife, Lee, later made their home in Lyme. "We fell in love with this beautiful rural enclave. It's 'paradise' in a way."

Now retired from a law firm that took him around the world, Pritchard is devoting his energies — and philanthropy — to Lyme's land conservation.

According to John, he's got a lot of help.

"Lyme is very unusual — there are about 800 households in the town and over half of them are members of the Lyme Land Conservation Trust. Lyme's conservation ethic may not be exceeded by any other town in the country."

As the chair of the Land Trust and an avid hiker, John sees the enormous responsibility in caring for its 113 properties comprising more than 3,000 acres (and growing). Dozens of trails need to be maintained for recreational and educational programs for all ages.



As a long-time committee and board member, he values the Foundation's commitment to dismantle inequities. That's why John established two charitable gift annuities at the Community Foundation. And he trusts the Foundation to invest his funds wisely.

After John's lifetime, his fund will benefit the Lyme Land Conservation Trust. With the gift of his endowment, John hopes the Land Trust can hire additional staff to steward the land, educate the next generation of conservationists, and create more inclusive open spaces for historically marginalized communities.

"If steps are taken now," he said, "it will benefit future generations forever."



## Barbara's Story

### THE BARBARA G. SAHAGAN LEGACY FUND

Barbara Sahagan used to put away ten dollars each week in her “safari fund.” It’s no wonder, then, that as she worked in a Pfizer lab for years to unlock treatments for Alzheimer’s disease, she sometimes ventured on trips to Africa.

A six-month stint as a Pfizer Health Fellow in rural Kenya testing people for HIV heightened her interest in global health.

Closer to home, she co-founded a network within Pfizer to open more educational and leadership opportunities for women at all levels of the company.

Retirement accelerated Barbara’s volunteerism — abroad and locally. “I like to feel that what I do has a purpose,” she said.

She headed to Uganda with the American Jewish World Service, joined the Community Foundation’s board and the grants committee of its Southeast Women & Girls Fund, rolled up her sleeves at the Jewish Federation of Eastern Connecticut’s food pantry, and lent her energies to Safe Futures in its work to end domestic violence.

The common thread through her varied philanthropic interests? “Helping women to better their lives, take control of their lives, and be fully independent,” she said.

She created the Barbara G. Sahagan Legacy Fund at the Community Foundation to do just that — and more — for generations to come.

A Mystic resident, Barbara selected many of her favorite causes to receive grants from the fund after her lifetime. She has entrusted the Community Foundation to grant more dollars locally, aligning with her wishes to protect human rights, preserve the environment, empower women and youth, and advance social justice.

“All the advocacy work the Foundation is trying to foster in other organizations is just so important,” she said.



# Choose the Legacy Giving Option That's Best for You

## Make a Bequest

Bequests are generally created through a will or living trust. You can indicate a specific dollar amount, a percentage of your estate, or what remains after all other gifts and expenses have been met. Just include the Community Foundation and fund name in your will or trust, and further outline your charitable intentions in a fund agreement.

*Sample bequest language: I give to the Community Foundation of Eastern Connecticut, Inc. (EIN #06-1080097), a nonprofit corporation located in New London, Connecticut, its successors and assigns, (insert specific assets, dollar amount, percentage or residuary of estate) for the (insert name of fund, or a specified purpose, or state "unrestricted").*

## Name the Community Foundation as a Beneficiary of your Retirement Plan

You can name the Community Foundation as the full, partial or contingent beneficiary of a retirement plan such as your IRA, 401(k) or 403(b). It's simple: go online or call your plan administrator and ask to list us as a beneficiary. This can be the most tax-advantaged way to make a future gift.

## Establish a Charitable Gift Annuity

You can make a gift for the long-term support of your charitable interests in exchange for a fixed, lifetime, annual income for yourself and/or one other person. You may qualify for tax benefits. The annuity payments can be paid out immediately or at a later date.

## Gift Your Life Insurance

You can make a gift of life insurance by irrevocably designating the Community Foundation as the owner and beneficiary or the partial or contingent beneficiary. This type of gift allows donors to plan for a much larger gift than they might otherwise have been able to give in their lifetime.

## Gift Your Real Estate or Personal Property

We accept gifts with a fair market value of \$50,000 or more. Real estate and personal property gifts can be complex and of substantial value, so please contact us to discuss this prior to making your gift.

## Establish a Charitable Remainder Trust

You can realize the tax advantages of making a gift now — especially of appreciated assets — while receiving income from the assets. After providing income to you during your lifetime, the remainder will be used to fulfill your charitable intent.

## Convert Private Foundation Assets

If you run a private foundation and wish to be freed from burdensome administrative, regulatory and tax requirements, you can donate the assets to the Community Foundation — yet retain all essential privileges of your private foundation.

# Direct Your Gift

Whichever giving option you choose, you can add your legacy gift to an existing fund, set up a new fund, specify a purpose, or leave it unrestricted to allow the Community Foundation to place your gift where the community need is greatest.

*We recommend that you consult with your professional advisor or attorney to determine which giving option makes the most financial sense for you.*



*Many donors have made legacy gifts to help generations of women and girls through one of the Community Foundation's Women & Girls Funds.*

[Photo by Frank Dinardi of Dinardi Visual Productions for Girls on the Run of Southeastern Connecticut.]



# You Can Do Lasting Good in the Communities You Love.

## WE'RE HERE TO HELP.

Our experienced staff is here to help you decide how best to put your giving plan into action. Your gift can be unrestricted or used to benefit a specific organization or community need.

### With the Community Foundation, you can expect:

- > Flexible giving options to meet your unique financial situation.
- > Administrative ease. We make it easy for you to give how and when you want.
- > Helpful collaboration with your financial advisor. We will work together to meet your philanthropic goals.
- > Access to our staff's deep knowledge of the region's assets and challenges and the nonprofits that serve our communities.
- > Wise investment strategies, so your gifts are thoughtfully stewarded for the greatest impact over time.
- > Trust — that we will always be here, directing your gifts to the issues you specify.

*Please fill out the "Planned Gift Intentions" form in the back pocket to ensure that your future charitable intentions are clear.*

### Meeting Your Community's Greatest Needs

You can give the Community Foundation the freedom to respond nimbly to the community's evolving and changing needs by making your gift unrestricted.

We will apply your gift where it is needed the most.



*Directing a gift to the Community Foundation can support resources like food banks, community gardens, and healthy food initiatives in the region.*

The Community Foundation of Eastern Connecticut serves 42 towns in New London, Windham and Tolland Counties:

Ashford, Bozrah, Brooklyn, Canterbury, Chaplin, Colchester, Columbia, Coventry, Eastford, East Lyme, Franklin, Griswold, Groton, Hampton, Killingly, Lebanon, Ledyard, Lisbon, Lyme, Mansfield, Montville, New London, North Stonington, Norwich, Old Lyme, Plainfield, Pomfret, Preston, Putnam, Salem, Scotland, Sprague, Stafford, Sterling, Stonington, Thompson, Union, Voluntown, Waterford, Willington, Windham, Woodstock.

*The Community Foundation of Eastern Connecticut is accredited by the National Standards for U.S. Community Foundations for its commitment to legal compliance, philanthropic best practices and excellence that benefits communities.*



Community Foundation  
of Eastern Connecticut

### OUR VISION

A healthy, thriving, sustainable Eastern Connecticut with greater equity for all.

### OUR MISSION

Collaborating with partners to put philanthropy into action to address the needs, rights and interests of our community in Eastern Connecticut.

### OUR VALUES

Integrity, Equity, Respect, Courage, Empathy

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