

What is a Legacy Advised Fund?

A Legacy Advised Fund is a charitable instrument funded at death that simplifies the distribution of assets held in retirement accounts and insurance policies to a variety of ministry organizations.

Methods of Funding a Legacy Advised Fund

Legacy Advised Funds can be funded using:

- Retirement Accounts
- Insurance Policies
- Last Will and Testament
- Charitable Remainder Trust
- Revocable Living Trust
- Annuities

Establishing a Legacy Advised Fund

- Download a Legacy Advised Fund Application and Agreement or access online form: orchardalliance.org/legacy-advised-funds
- Complete and sign
- Attach copies or original documentation for assets funding the instrument
- Forward original signed agreement and attachments to Orchard Alliance or to your relationship manager

LEGACY ADVISED FUNDS Minimum Fee* — \$300.00

**charged at distribution; monthly fees begin if held more than 3 months*