Sending Gifts of Stock or IRA Funds to Island Senior Resources and Planned Giving Engagement

(Island Senior Resources is also called "Senior Services of Island County")

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charles@islandseniorservices.org,
(To set an appointment quickly, please call or use this link calendly.com/charles-lafond.)

Thank you. Thank you very much for remembering us with a planned gift, be it a gift managed from investments or a planned gift.

On behalf of the thousands of clients served these last 50 years and still thousands more in the next 50 years, we appreciate your willingness to invest in the work of Island Senior Resources.

To include Island Senior Resources in your will or estate plan and become a member of the Island Good Ancestor's Society, please work with your financial advisors on the plan that best suits your financial and bequest goals. Please call me 24/7 at 360-210-3011 or charles@islandseniorservices.org if you need further documents or collaboration as you make planned gifts, and please give my email and phone number to your financial planner, with whom I would be pleased to meet. Please let me know if you want me to call or visit your financial planner. Once a planned gift (bequest, legacy gift, will inclusion, etc.) is even considered by you, we would like to place your name or the word "anonymous" on our Good Ancestors remembrance wall.

To meet with me, please call to set an appointment, or an easy way to schedule me at your convenience is this small scheduling tool: calendly.com/charles-lafond

To give a gift from established accounts to the Annual Giving Campaign or a bequest fund in your name, and if you have a Raymond James account, then your branch can manage an "Authority To Transfer Internal" process from your account to "Senior Services of Island County" (I know…we need to change that name, but for now, that is the name on the account.)

Our Island Senior Resources Federal Tax ID is 52-1049443

If you do not have an account with Raymond James, then you will need to give the following information to your account manager:

Island Senior Resources' Raymond James' DTC # is 0725
Attention: Tyrell Lacy, 425-274-2430

The Island Senior Resources account is called.

“Senior Services of Island County” is listed as a “non-profit corporate account.”
The Account number is 752YR375.

It may be that your account manager or their firm will need to ask you to sign a form or letter “of authorization,” depending on their transfer policies.

Please let me know if you need any other information. I would be grateful to know that the stock transfer has been asked for on your end so that I can let you know when and that it has arrived safely.

Commonly Asked Questions

How much of my gift goes directly to programs?

Approximately 90% goes to programs! To read more or to give online, visit our website at **https://senior-resources.org/donate.**

How do I endow my annual gift?

One way is to set aside an amount in your planned giving equal to that which would generate your annual gift from annual earnings. For example, if I give $10 annually, I would set up a planned giving fund that generated $10 annually because I set aside $200 to generate that $10 in annual earnings from interest. To generate $100 annually, I would set aside or give ISR $4,000 (20 times the amount one would like to generate.). Many people make these provisions in their wills to replace their annual gifts at their death. Others use more complex tools such as insurance, trusts, etc., but they do that with the advice of their estate planner and financial advisor.

May I designate my/our gift or bequest to a particular program?

We would be pleased to discuss this with you in person, and some annual donors designate gifts. Still, planned gifts are usually requested not to be designated to allow the future of our programming needs to unfold over the next few decades and centuries of that bequest’s working life for our client’s needs. We do not know what the future holds for our clients in 2043 AD or 2086 AD, so we would prefer bequests to be flexible to meet needs as yet unknown.

Will you tell me what you did with my donation?

Yes, indeed! When you pledge or give, we will immediately send our thanks and another thank you letter for your taxes in January of the year after you pledge or give. Then you will be added to our list of donors (if you wish) when we send you an Impact Report showing, in story and data, what your gift has accomplished.