



LYCÉE FRANÇAIS
DE SAN FRANCISCO

your family
your values
your legacy

Estate Planning & Planned Giving



Create a lasting legacy

The welfare of family comes first

If you do not have an estate plan, it's time to give serious thought to that vital protective document. By including a gift to Lycée Français de San Francisco in your plans you can reduce the tax liability on your estate and at the same time contribute to the financial strength and stability of the school that has played a vital role in your life, or in the education of your children or grandchildren..

This brochure offers information and options for your consideration. If you would like to discuss further your LFSSF legacy, please contact the Advancement Office at 415-61-5232.

We can connect you with expert legal help if you do not already have a lawyer, who specializes in estate planning.

An effective estate plan reflects your life & values



An estate plan is an essential shield

An estate plan is an essential safeguard for all families regardless of wealth or age. It protects survivors' assets, insures proper care of children, minimizes estate and other taxes and gives your instructions for distributions in case of sudden disability and incapacity. Without an estate plan, such decisions automatically become the responsibility of the court system, are decided by an impartial judge and invoke maximum costs and fees.

An effective estate plan ably serves your personal, financial, and philanthropic goals.

An estate plan is affordable

The penalties for not having a plan can often be more costly than the price of creating one in advance. "Small estates" procedures allow for transfer of assets at death without a formal probate proceeding.

In California, the small estate threshold is for estates that are \$150,000 or less.



A planned gift is meaningful

What is a planned gift?

A planned gift is a donation from your estate used to support non-profit organizations or institutions that support your philanthropic goals. Planned gifts ensure the best use of available gift and estate tax credits, deductions, and exclusions, and represent a meaningful way to support LFSF without affecting your current financial situation. A planned gift will sustain a life-long connection to an institution that played an important role in the life of your family.

Many people use trusts, donor-advised funds, assigned life-insurance policies, and other tools to make gifts while they are still living.

We are here to help

If you would like to explore a planned gift to LFSF in your existing estate plans, or would like information about creating an estate plan, contact the Department of Institutional Advancement.

For more information on the estate plan that is best for you, please contact your family attorney. If you do not have a family attorney, or would like to talk with estate planning specialists, we are happy to recommend for your consideration:

Amir Atashi Rang, Esq.*

The Atashi Rang Law Firm P.C.

101 Mission Street, Suite 380, San Francisco, CA 94105

(415) 398-7275 | (415) 839-9440 fax

amir@arp-law.com | www.arp-law.com

Your gift will have an enduring impact

The LFSF Endowment Fund

Planned gifts are frequently designated to a school's endowment and often bear the names of their donors. Endowments provide enormous financial strength, stability, and longevity to an educational institution. Unlike annual fund gifts, contributions to an endowment fund are never spent. Rather, gifts to an endowment are invested and in turn generate interest and profits. The larger the endowment grows, the more profit it generates. The LFSF Endowment Fund is a permanent, self-sustaining source of funding and your gift will therefore have an enduring impact.

Year after year you will be supporting student programs, professional development, scholarships, student life and activities.



LFSF 1967 Legacy Society

Our *LFSF 1967 Legacy Society* is named for the year of the institution's creation. Its purpose is to honor those donors who have generously included the school in their estate plans or planned giving. Their generosity is a reflection of a personal goal to help insure a strong and enduring financial foundation for the school.

If you are interested in a membership with *LFSF 1967 Legacy Society* please contact the Department of Institutional Advancement.

Lycée Français de San Francisco | Department of Institutional Advancement
415-661-5232 - Eric Frugé extension 2701
advancement@lelycee.org
755 Ashbury Street, San Francisco, CA 94117

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A Proud History – A Promising Future

The Lycée Français de San Francisco was founded in 1967 under the name Lycée Français la Pérouse. Beginning in a church basement with a total of twenty students, the school today has approximately 1,000 enrolled on three campuses in San Francisco and Marin. It boasts a diverse community of students, families, faculty and staff, and Board members, providing a rich educational environment that emphasizes academic excellence and personal achievement. Our program is based on the highly respected and prestigious French national curriculum and is enriched by core college-preparatory American courses to open doors for our students to the best colleges and universities in the world.

There are various types of planned giving that are available to LFSF donors. By choosing options that best correspond to your personal financial strategy you can insure your goals are met and help secure the future of the Lycée Français de San Francisco.

The information in this brochure is not intended as legal or tax advice. Please contact your own legal and/or tax advisor for information most applicable to you.

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A World of Opportunities

aefe
Agence pour
l'enseignement français
à l'étranger

