



# monarch school

## Planned and Endowment Giving Ways to Make a Difference that Lasts

### 1. Bequest

Naming Monarch School as a beneficiary through your will or living trust is an easy way to make a meaningful difference without affecting your current finances.

Sample language:

"I hereby give to Monarch School, a 501c3 (Tax ID 33-0871354), the sum of \$ \_\_\_\_\_  
(or \_\_\_\_\_ percent of my estate)."

### 2. Life Insurance Policy

By adding Monarch School as a beneficiary to your life insurance policy, you can help provide services to San Diego's homeless children in addition to taking care of your loved ones.

### 3. Retirement Plan

Designating Monarch School as a beneficiary to your retirement assets can not only help support our school, but can help lessen the burden of estate taxes on your family members or heirs, and your gift will be given tax-free

### 4. Charitable Remainder Trust

After serving it's purpose of providing additional income during your lifetime, remaining funds in a trust can help benefit Monarch's mission of educating homeless students in San Diego.

## Endowment

You could also choose to support the Monarch School in perpetuity by helping grow our endowment. We currently have an endowment fund at the San Diego Foundation and Jewish Community Foundation San Diego. A gift of this type will create a self-sustaining donation that will support Monarch for years to come.

If you are interested in supporting Monarch through planned giving, please contact:

Katherine Field, Community Affairs Manager  
(619) 652-4100 x1600 [kfield@monarchschoools.org](mailto:kfield@monarchschoools.org)

Monarch School Tax ID 33-0871354