Sky Foundation, Inc.

PANCREATIC CANCER | FINDING AN ANSWER

Leave a Legacy

WWW.SKYFOUNDATIONINC.ORG

make Your Mark on Pancreatic Cancer Research

MICHIGAN'S PANCREATIC CANCER ORGANIZATION

Support Pancreatic Cancer Research

Your philanthropic legacy can help propel breakthroughs in detection, treatment and survivorship care for pancreatic cancer. Below are three giving vehicles that many donors like you are using to make a meaningful difference now and for generations to come.

1 Gifts of Publicly-Traded Stock (and Securities)

Donating appreciated stock, mutual funds or other publicly-traded securities may offer significant tax advantages — and amplify your impact:

- When you donate shares you have owned for more than 12 months, you generally may deduct the full fair market value (subject to applicable limits) and avoid paying capital-gains tax on the appreciated amount.
- Your gift to Sky Foundation is converted to research funds, not reduced by the tax you might have owed if you sold the asset first.
- Practical steps: decide which shares to give; obtain our brokerage transfer information; complete your brokerage's transfer form; notify us so we may acknowledge your gift appropriately.
- Because many nonprofits now accept stock gifts, this is a streamlined, impactful giving option.

At Sky Foundation, we welcome gifts of stock which can be directed toward funding our pancreatic cancer research initiative, supporting our grant programs, or establishing named research awards. Your gift becomes a legacy of hope, powering new science and patient-support programs.

2 Donor-Advised Funds (DAFs)

A donor-advised fund provides a flexible philanthropic vehicle: you make a contribution (cash, stock, etc.) to a DAF, receive an immediate tax deduction, and then recommend grants over time (for example, to Sky Foundation). Key features:

- A DAF is a public charity fund you control through “advising” grants.
- You can fund the DAF now (and take the deduction now) while recommending grants over months or years – this may help you align giving with tax or liquidity planning.
- Many DAF sponsors accept non-cash gifts (stock, mutual funds, sometimes real estate) which then enable grants to charities like Sky Foundation.
- By recommending a grant to Sky Foundation from your DAF, you direct funds to support our pancreatic cancer mission while enjoying philanthropic flexibility and tax advantage.

Whether you already have a DAF or are considering establishing one, you can designate Sky Foundation as a recipient of one or more future grants from your fund, earmarked for research, patient support or advocacy.

3 Legacy Gifts & Planned Giving

Legacy giving (also called planned giving) refers to gifts arranged now that support the organization later — often at death or from estate assets. These gifts allow you to create a lasting philanthropic footprint with resources that may exceed what you give annually.

Common vehicles include:

- A gift to Sky Foundation in your will or living trust (bequest) – a simple, powerful way to support our pancreatic cancer research without changing your current lifestyle.
- Naming Sky Foundation as beneficiary of a retirement account or life insurance policy.
- Creating a charitable remainder trust or gift annuity where you receive income during life and the remainder supports our mission later.
- For major donors, legacy gifts are often among the largest gifts an organization receives — helping secure the nonprofit’s future.

At Sky Foundation, bequests and other deferred gifts help us plan boldly: investing in long-term research programs, establishing named endowments, and sustaining patient & caregiver support initiatives. By including us in your legacy plan, you can leave a lasting marker of hope in the fight against pancreatic cancer.

Planned Giving Quick-Start

Choose Your Giving Path

1 Gift of Stock (Appreciated Securities)

1. Identify long-held appreciated shares (owned >12 months).
2. Email us for brokerage transfer instructions.
3. Submit your broker’s DTC transfer form.
4. Tell us the stock, share count, and date so we can properly receipt and direct your gift to pancreatic cancer research.

2 Donor-Advised Fund (DAF)

1. Log in to your DAF (Fidelity, Schwab, Vanguard, community foundation, etc.).
2. Recommend a grant to Sky Foundation, Inc.
3. Note your intended purpose (e.g., research, patient/caregiver support, or “where most needed”).
4. Notify us so we can confirm and steward your impact.

3 Legacy Gift (Will/Trust/Beneficiary)

1. Choose a bequest type: fixed amount, percentage, or residuary gift.
2. Ask your attorney to add/update language naming Sky Foundation, Inc.
3. (Optional) Name Sky Foundation as a beneficiary of a retirement plan or life insurance.
4. Share your intentions with us (confidential) to ensure your wishes are honored.

What to Have Ready

- [ ] Full name(s) and contact info
- [ ] Gift type (Stock, DAF, Legacy) and purpose
- [ ] Approximate gift amount or asset description
- [ ] Your advisor/attorney contact (if applicable)

How We’ll Partner With You

- Provide brokerage/DTC details for stock gifts
- Confirm DAF grant receipt and apply to your stated purpose
- Share model bequest/beneficiary language for your attorney
- Offer impact updates and recognition options (or anonymity)

Contact Us

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