

TATHATA GOLF FOUNDATION™

MAJOR DONOR PROGRAM

TATHATA GOLF FOUNDATION
MISSION STATEMENT

Ensure the game of golf ***THRIVES WORLDWIDE***, & give every child a **SIMPLE, FREE, & FUN** way to learn this incredible game.

To donate and give to others brings us happiness beyond measure. Our Major Donor Program is to reward those who love the spirit of golf, inspired by the greatest players to ever walk the greens, and who want to leave a legacy of golf in lives around the world.

Our program levels, or tiers, are based on the history of the sport and the legacy that has been left to us by the greats. We are reminded every year of their greatness when we invite them and celebrate at our annual "Celebration of the Greats." We hope you will join us in this mission and help spread their legacy to golfers worldwide. It is our core belief that golf can be way more fun, easy, and affordable that it currently is.

On the next few pages you will find the various ways you can help us ensure golf is healthy around the world, as well as instructions on how to do so. You will also see the incentive levels and rewards for our Major Donor Program. Our rewards are just our small way of simply saying thank you, as true rewards and smiles come not from what we get, but from what we give.



TATHATA GOLF FOUNDATION
REWARDS PROGRAM



TITANIUM

$25K – $100K

Titanium Level Donors Receive:

- Invite to Annual Celebration With The Greats Event
- Recognition Plaque on our Major Donor Wall
- Personalized Thank You Card
- Certificate of Donation
- Tathata Hat
- Embroidered Tathata Leather Headcovers
- Embroidered Tathata Golf Bag

Our Titanium Level includes 5 Tathata Golf Memberships you can give to family, friends, or teams in your name as well as 2 VIP tickets to our Annual Celebration With The Greats Event.



STEEL

$100K - $500K

Steel Level Donors Receive:

- Invite to Annual Celebration With The Greats Event
- Recognition Plaque on our Major Donor Wall
- Personalized Thank You Card
- Certificate of Donation
- Tathata Hat
- Embroidered Tathata Leather Headcovers
- Embroidered Tathata Golf Bag

Our Steel Level includes 10 Tathata Golf Memberships you can give to family, friends, or teams in your name as well as 4 VIP tickets to our Annual Celebration With The Greats Event.



PERSIMMON

$500K - $1M

- Persimmon Level Donors Receive:
- Invite to Annual Celebration With The Greats Event
- Recognition Plaque on our Major Donor Wall
- Personalized Thank You Card
- Certificate of Donation
- Tathata Hat
- Embroidered Tathata Leather Headcovers
- Embroidered Tathata Golf Bag

Our Persimmon Level includes 20 Tathata Golf Memberships you can give to family, friends, or teams in your name as well as a table for 8 VIP guests at our Annual Celebration With The Greats Event.



BEECHWOOD

$1M+

- Beechwood Level Donors Receive:
- Invite to Annual Celebration With The Greats Event
- Recognition Plaque on our Major Donor Wall
- Personalized Thank You Card
- Certificate of Donation
- Tathata Hat
- Embroidered Tathata Leather Headcovers
- Embroidered Tathata Golf Bag

Our Beechwood Level includes 40 Tathata Golf Memberships you can give to family, friends, or teams in your name as well as a table for 8 VIP guests at our Annual Celebration With The Greats Event.

TATHATA GOLF FOUNDATION
LARGE DONOR INSTRUCTIONS

When most people think of gifts, they think of cash gifts. But when it comes to charitable gifts, there may be a better way. The Tathata Golf Foundation appreciates cash gifts – but cash gifts often affect your cash flow and usually represent after-tax dollars. Most donors don't realize that non-cash gifts may have the same impact as cash gifts on your tax liability – and, in some instances, may offer an even better tax outcome.

If you have any questions about any of the gifting options, please contact us. We would be happy to assist you and answer any questions that you have.

GIFTS OF CASH



Gifts of cash are the most basic and important source of support for the Tathata Golf Foundation. Also, the higher your tax bracket, the more your charitable tax deductions are worth to you. As a general rule, a cash gift is:

- Deductible up to 50 percent of your adjusted gross income each year. Unused deductions may be carried over and used for five years after the gift is made.

- Complete on the date it is hand delivered or mailed. For example, a year-end gift mailed in December is deductible that year, even if not received until January. Keep this in mind for year-end tax planning!

HOW TO MAKE GIFTS OF CASH

Online:

Visit TathataGolfFoundation.org.
Many prefer online giving as there is a double benefit of using your credit card to earn points on your donations.

Electronic Wires:

Direct them to: Wells Fargo Bank, N.A. - Arizona
Credit: **Tathata Golf Foundation** ***Routing # 122105278 Acct # 6725977851***

Mail: You can send us a check or money order:

Tathata Golf Foundation
7501 E. McCormick Parkway #106
Scottsdale, AZ 85298



GIFTS OF STOCKS AND BONDS



Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift to the Tathata Golf Foundation. There are special rules for valuing a gift of stock.

The value of a charitable gift of stock is determined by taking the mean between the high and low stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

HOW TO MAKE GIFTS OF STOCKS AND BONDS

By electronic transfer:

Please have the broker contact us for transfer instructions. Email Kyle Walters at **kwalters@tathatagolffoundation.org.** Please provide in your email the stock name, your name, address, phone number, and total value of gift so we can properly assist you with your donation.

By certified mail:

If you hold securities in certificate form, you will need to mail two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail to:

Tathata Golf Foundation
7501 E. McCormick Parkway #106
Scottsdale, AZ 85298

GIFTS OF REAL ESTATE



Donating appreciated real estate, such as a home, vacation property, land, ranch or commercial property can make a great gift. Enjoy massive tax benefits while leaving a lasting legacy to the Tathata Golf Foundation.

HOW TO MAKE GIFTS OF REAL ESTATE

Your real estate property may be given to the Tathata Golf Foundation by executing or signing a deed transferring ownership. You may deed part or all of your property. Your gift will generally be based on the property's appraised fair market value.

Mortgaged Property:

Please contact us if the property you wish to give has existing debt or a mortgage. Indebtedness can affect your charitable tax deduction.

Difficult Property Gifts:

Certain properties pose challenges. We have adopted policies to limit the acceptance of certain kinds of real estate.

Please check with us before making a gift of real estate so we can explain our gift acceptance policies.

Capital Gains Tax:

Check with us on the capital gains tax implications of your gift. You may also be interested in life income options.

If you have any questions about gifts of real estate, please contact us. We would be happy to assist you and answer any questions that you have.

GIFTS OF RETIREMENT ASSETS AND INSURANCE



Donating part or all of your unused retirement assets, such as your IRA, 401(k), 403(b), pension or other tax-deferred plan, is an excellent way to help the Tathata Golf Foundation, as most people do not use all of their retirement assets during their lifetime.

- Avoid potential estate tax on retirement assets
- Your heirs would avoid income tax on any retirement assets funded on a pre-tax basis
- Receive potential estate tax savings from an estate tax deduction

If you have a life insurance policy that has outlasted its original purpose, consider making a gift of your insurance policy to the Tathata Golf Foundation. For example, you may have purchased a policy to provide for minor children and they are now financially independent adults.

HOW TO MAKE GIFTS OF RETIREMENT ASSETS

To leave your retirement assets to the Tathata Golf Foundation, you will need to complete a beneficiary designation form provided by your retirement plan custodian. If you designate the Tathata Golf Foundation as beneficiary, we will benefit from the full value of your gift because your IRA assets will not be taxed at your death. Your estate will benefit from an estate tax charitable deduction for the gift.

Did you know 60%-70% of your retirement assets may be taxed if you leave them to your heirs at your death? Another option is to leave your heirs assets that receive a step up in basis, such as real estate and stock, and give the retirement assets to the Tathata Golf Foundation. As a charity, we are not taxed upon receiving an IRA or other retirement plan assets.

Please let us know if you have already named the Tathata Golf Foundation as a beneficiary of your retirement assets. We would like to thank you and recognize you.

HOW TO MAKE GIFTS OF INSURANCE

To make a gift of life insurance, please contact your life insurance provider, request a beneficiary designation form from the insurer and include the Tathata Golf Foundation as the beneficiary of your policy.

You can also designate the Tathata Golf Foundation as a partial, full or contingent beneficiary of your life insurance policy. You will continue to own and can make use of the policy during your lifetime. Your estate may benefit from an estate tax charitable deduction. Your deduction for the gift of life insurance will depend on whether the policy has increased in value above the premiums and whether the policy is paid up or there are remaining payments to be made.

THANK YOU

To all who have shared your heart, your training, and your inner wisdom I thank you for all of your care and love.

"As you move down this list know that I did not intend to make one moment more important than the rest, all moments equally have opened my heart. Forgive me if I have forgotten to mention your teaching and know that over time this list is growing. I want to thank in advance all those who will be drawn to come in the moments ahead."

- Bryan Hepler Tathata Golf Foundation Founder





TATHATA GOLF FOUNDATION™

Developing Golf's Next Generation







