



## Bozeman Public Library Foundation Planned Giving Program

### Planned Gifts

The Bozeman Public Library Foundation provides support for a full range of charitable gift planning options and services. The Library Foundation Board, its employees or representatives, do not offer legal or financial advice. We strongly urge prospective donors to consult with their attorney, financial advisor, estate planning professional, accountant or other appropriate professional before making any material decisions based on information we provide through our website, printed materials, or other sources. We welcome the opportunity to help you identify tax-wise and beneficial ways to support the critical work of the Bozeman Public Library Foundation. Please feel free to contact us directly for information or assistance on a confidential basis.

### 1. GIFTS UNDER A WILL

The following options provide examples of how you might consider the Bozeman Library Foundation in your will.

- a. General Testamentary Gift: Specific Monetary Amount: *I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to the Bozeman Public Library Foundation, located at 626 E. Main Street, Bozeman, MT, or its successors-in-interest, to be used for general purposes.*
- b. General Testamentary Gift: Percentage Of Residue Of Estate: *I hereby give and bequeath \_\_\_\_\_ Percent ( \_\_\_\_\_ %) of the rest and residue of my estate to the Bozeman Public Library Foundation, located at 626 E. Main Street, Bozeman, MT, or its successors-in-interest, to be used for general purposes.*
- c. Restricted Testamentary Gift: Specific Monetary Amount: *I hereby give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to the Bozeman Public Library Foundation, located at 626 E. Main Street, Bozeman, MT, or its successors-in-interest, to be used for [insert donor restriction].*
- d. Restricted Testamentary Gift: Percentage Of Residue Of Estate: *I hereby give and bequeath \_\_\_\_\_ Percent ( \_\_\_\_\_ %) of the rest and residue of my estate to the Bozeman Public Library Foundation, located at 626 E. Main Street, Bozeman, MT, or its successors-in-interest, to be used for [insert donor restriction].*

### 2. GIFTS FROM A TRUST

The following provides an example of how you might consider the Bozeman Public Library Foundation in a trust.

[Insert contingency (e.g., Upon the death of my spouse)], *the Trustee shall distribute \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) to the Bozeman Public Library Foundation, located at 626 E. Main Street, Bozeman, MT, or its successors-in-interest, free and clear of trust, to be used for general purposes.*

### **3. GIFTS OF LIFE INSURANCE OR IRA**

The Bozeman Public Library Foundation may be named as the beneficiary of an asset that passes outside the terms of a will or a trust such as a life insurance policy, IRA or 401(k). In order to make your wishes known, please contact your IRA or retirement account custodian. The legal name your representative will need to include is:

*Bozeman Public Library Foundation, Inc., 626 E. Main Street, Bozeman, MT 59715*

### **4. CHARITABLE GIFT ANNUITY**

A Charitable Gift Annuity is one of the easiest gifts to create. All you'll need to do is contact a Bozeman Library Foundation representative to setup a CGA agreement and then determine whether you would like to use cash or other assets to fund your gift annuity.

To learn more about a Charitable Gift Annuity or for a confidential, complimentary illustration of the payments and tax benefits you might receive from the Bozeman Public Library Foundation, please call us at 406-582-2426.

### **5. GIFTS OF STOCK**

Simply provide your broker or financial advisor with the following wiring instructions:

- DTC ID # 5198 for further credit to the Bozeman Public Library Foundation,
- Account # 402-04090 at Merrill Lynch.

For gifts of stock, please call us at 406-582-2426.

### **6. GENERAL INFORMATION**

General information that may be beneficial to you in finalizing your estate plan:

- Legal Name: Bozeman Public Library Foundation, Inc.
- Incorporation Details: 501(c)(3) organization, classified as a public charity, exempt from federal income tax
- Mailing Address: 626 E. Main Street, Bozeman, MT 59715 *or* P.O. Box 6242, Bozeman, Montana 59771