

WAYS TO GIVE



Gift by Bequest

Most legacy gifts cost you nothing now. There is no immediate contribution required, and you can change your beneficiaries at any time. Consider leaving a gift to Historic Sotterley in your will or trust or by beneficiary designation so future generations can share Sotterley's story.

Gift of Retirement Plan

Retirement assets are among the most heavily taxed, making them an ideal resource for charitable giving. As a tax-exempt nonprofit, Historic Sotterley is exempt from paying the taxes that might otherwise be owed. Make Sotterley a beneficiary of your retirement assets and leaving other less-heavily taxed assets to loved ones.

Gift of Life Insurance

Life insurance is an affordable way to leave a gift to Historic Sotterley while also enjoying tax savings during your lifetime.

Benefits include:

- A significant gift from disposable income at a fraction of the value
- Tax savings can be immediately realized
- Your donation could reduce final taxes of your estate
- Insurance gifts transfer outside the estate

Gift of CD, Bank or Brokerage Accounts

Name Historic Sotterley the beneficiary of a certificate of deposit, a checking or savings bank account, or brokerage account. Simply request a Pay on Death (POD) or Transfer on Death (TOD) designation form from your financial institution.

Gift of Donor-Advised Fund Residuals

Final distribution of contributions remaining in a DAF is governed by the contract you completed when you created your fund. Name Sotterley as a beneficiary of your account. Or, name us the beneficiary a portion of the account value, leaving the remaining portion for your heirs to continue your legacy of philanthropy.

DECLARATION OF INTENT

Thank you for naming Historic Sotterley in your estate plans. The information you provide here will ensure that we have accurate records so that we can provide the best possible stewardship of your gift. This is not a binding legal document, and your information will be kept confidential.

Name: _____ Spouse Name: _____
 Date of Birth: _____ Date of Birth: _____
 Address: _____
 Email: _____ Phone: _____

I/We are pleased to inform you of a deferred gift to Historic Sotterley, Inc.

Type of Gift: _____ **Value of Share:** _____

- Gift by Will
 - Specific bequest \$ _____
 - Residual bequest - ____% of my estate \$ _____
- Retirement Plan Assets \$ _____
- Charitable Remainder Trust \$ _____
 - Irrevocable Revocable
- Life Insurance Policy \$ _____
- Other _____ \$ _____

Designated Purpose

- Unrestricted
- Restricted, to be used as follows:
 - Where Need is Greatest Education Preservation Grounds & Landscape

Acknowledgment

- I/We are happy to have our planned gift recognized as follows:

I/We have made this gift in honor/memory of :

I/We would like our planned gift to be anonymous.

Signature _____ Date _____
 Signature _____ Date _____

Please return to: Historic Sotterley, Inc.
PO Box 67, Hollywood, MD 20636 or email to development@sotterley.org