Planned gifts allow you to provide a secure future—for yourself, your loved ones, and children and families who will visit The Children’s Museum for generations to come. Choosing the right planned gift depends on your personal circumstances and your financial goals. The following planned gift options will help you tailor your gift to meet your unique needs and desires for the future.

**Bequest**
A bequest is a gift from your estate and is one of the easiest ways to leave a gift to The Children’s Museum.

**How It Works**
You can make a bequest to The Children’s Museum by including language in your will or living trust that specifies your gift. If you already have a will or living trust, you can add an amendment—a codicil—that simply includes gift details. You can make a bequest as a transfer of cash, securities, or other property.

**Benefits of a Bequest**
Some of the benefits of creating a bequest include:
- Gifts from your estate are exempt from federal estate taxes.
- You maintain control and use of your assets during your lifetime.
- You can modify your bequest if your circumstances change.

**Charitable Remainder Trust**
A charitable remainder trust lets you convert an appreciated asset like stock or real estate into an irrevocable trust, which pays you and/or another beneficiary a lifetime income and lowers your taxes, all while supporting The Children’s Museum.

**How It Works**
A charitable remainder trust is funded with appreciated assets or property. The trust pays you and/or another beneficiary an income for life or for a specific number of years. At the time of your death or at the end of the specified period, the remaining assets pass to The Children’s Museum.

There are two types of charitable remainder trusts:
- **Charitable remainder unitrust** pays a fixed percentage of the trust’s principal each year, which means your income will go up or down based on the trust’s value at the beginning of each year. This option allows you to make additional gifts to the trust.
- **Charitable remainder annuity** trust pays a fixed dollar amount each year for the term of the trust. You can’t make additional gifts to the trust with this option.

**Benefits of a Charitable Remainder Trust**
A charitable remainder trust offers significant tax advantages, including:
- Reduced federal income taxes for a charitable deduction
- No capital gains tax when the appreciated assets are sold
- Reduced or eliminated estate taxes for your heirs
Charitable Gift Annuity
A charitable gift annuity allows you to support The Children’s Museum while providing yourself a fixed income and the flexibility to decide when to start receiving payments.

How It Works
When you establish a charitable gift annuity with a gift of cash or appreciated securities, The Children’s Museum agrees to make regular, fixed annual payments to you for your lifetime. You can begin taking payments right away or defer payments until you reach a certain age. The older you are when you begin taking payments, the higher the interest rate you’ll receive.

Benefits of a Charitable Gift Annuity
A charitable gift annuity offers an attractive combination of tax benefits and guaranteed fixed income for life. Benefits include:
- Reduced federal income taxes for a charitable deduction
- A portion of your annuity payments being tax free
- Reduced capital gains taxes on appreciated securities
- Flexibility to decide when to start taking payments

Charitable Lead Trust
A charitable lead trust allows you to pass assets to your heirs with reduced or no estate taxes, along with providing fixed annual payments to The Children’s Museum.

How It Works
Funded with your gift of appreciated assets or property, a charitable lead trust makes payments to The Children’s Museum for a specific number of years. When that period of time ends, whatever assets are left go to your family or named beneficiaries.

Benefits of a Charitable Lead Trust
A charitable lead trust gives you the opportunity to provide a lasting legacy for both your family and The Children’s Museum. Benefits of a charitable lead trust include:
- Reduced or no estate taxes for your heirs on the inherited assets
- The flexibility to choose the term of the trust and annual payment to The Children’s Museum
- Opportunity for trust assets to continue growing while supporting the museum

Plan Your Legacy
Your planned gift to The Children’s Museum will transform your generosity into extraordinary learning experiences for generations of families. Leave a legacy that will run deep and wide in the decades ahead. Contact Judy Stewart, Planned Giving Officer, to explore the possibilities.
317-334-3839
judys@childrensmuseum.org