



# Bequests

## BENEFITS OF A BEQUEST TO ADVENTURE UNLIMITED

- Invest in future generations of Adventure Unlimited campers and participants
- Develop young leaders who are students of Christian Science
- Preserve Adventure Unlimited's enduring impact on young lives
- Receive an estate tax charitable deduction and lessen the burden of taxes on your family
- Leave a lasting testimony of what Adventure Unlimited means to you
- Share your values with family and loved ones

## HOW YOU CAN MAKE A BEQUEST

A bequest is one of the easiest gifts to make and among the most powerful ways to help Adventure Unlimited. With the help of an attorney, you can include language in your will or trust specifying a gift to be made to family, friends or Adventure Unlimited as part of your estate plan.

*Sample language:*

"I give, devise and bequeath [\$\_\_ or \_\_%] of the rest and residue of my estate to Adventure Unlimited, 5201 S. Quebec Street, Greenwood Village, Colorado, to be placed in [choose option: General Endowment or the Annual Fund]."

## YOUR BEQUEST OPTIONS

- Gift a percentage of your estate, a specific dollar amount or asset, or a portion from the balance or residue of your estate.
- Make a gift that produces income for life such as a charitable gift annuity and remainder trust.
- Gift a retirement asset, such as an IRA account or other qualified retirement plan (e.g., 401(k) or 403(b) account). If given to your family, much of the IRA's value may be lost through income and

estate taxes. By designating Adventure Unlimited as the beneficiary of all or part of your IRA (using a beneficiary designation form provided by your plan administrator), the full value of the gift is transferred tax-free at your death. Note: The IRS now permits lifetime transfers from an IRA to Adventure Unlimited by individuals age 70½ and older. Call us for more information.

Please work with your advisor to ensure the proper legal language is included in your estate plans. If you have questions about including Adventure Unlimited in your future plans, we'd be glad to connect you with a member of our gift planning team.

If you have included Adventure Unlimited in your estate plans, please let us know so that we can welcome you as a member of our **Summit Society!**

*Adventure Unlimited's tax identification number is 43-0798771.*

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