



Retirement Plan Gifts

A gift of retirement assets – such as a gift from your IRA, 401(k), 403(b) or other tax-deferred retirement plan – is an excellent way to leave a legacy to Adventure Unlimited. It's an easy way for you to make a future gift and help further our mission.

GIVE YOUR RETIREMENT ASSETS IN YOUR WILL

Did you know that qualified retirement plan assets are treated as taxable income if you leave them to your heirs? It may be better to leave retirement plan assets to charity and direct non-retirement plan assets to your heirs. Your heirs won't owe any income tax and there won't be any tax on retirement plan assets that you leave to Adventure Unlimited.

HOW TO TRANSFER YOUR RETIREMENT ASSETS

The first step in leaving retirement plan assets to Adventure Unlimited is to complete a beneficiary designation form provided by your plan administrator. If you designate Adventure Unlimited as a beneficiary of your retirement plan, we will benefit from the full value of any amount transferred to us after your death. Your estate can also benefit from an estate tax charitable deduction for the gift.

We encourage you to speak about this gift opportunity with your attorney or tax professional. We would also be happy to connect you with one of our philanthropic advisors to help you determine if leaving retirement plan assets to Adventure Unlimited makes sense for you.

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

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