LEGACY GIVING

A legacy gift is a meaningful way to support Mount Madonna's work now and into the future by including the organization in your long-term charitable giving or estate plans. These contributions help to ensure the continuity of the organization's mission for generations to come.

The following are six primary ways to make a legacy gift to Mount Madonna:

1. **WILL OR TRUST**
   Make a gift to Mount Madonna in your will or living trust. Your gift is revocable and remains under your control during your lifetime. You may leave a specific amount, property, or percentage of your estate.
2. **RETIREMENT PLAN BENEFICIARY**
   Name Mount Madonna as a beneficiary of retirement accounts such as an IRA, 401(k), or 403(b).
3. **LIFE INSURANCE BENEFICIARY**
   Designate Mount Madonna as a beneficiary of your life insurance policy. To deduct premium payments, you must name Mount Madonna as both owner and beneficiary of the policy.
4. **DONOR ADVISED FUND BENEFICIARY**
   Name Mount Madonna as a full or partial beneficiary of your donor advised fund (DAF).
5. **CHARITABLE GIFT ANNUITY OR CHARITABLE REMAINDER TRUST**
   Establish a charitable gift annuity (CGA) or charitable remainder trust (CRT) that provides income for you, often through fixed payments for life, while supporting Mount Madonna after your lifetime.
6. **PROPERTY**
   Donate appreciated real estate or other property.

QUESTIONS?

Contact Andy Tompsett, Philanthropy Director
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