

Ensuring  
**RMLF's**  
— FUTURE

Rogers Memorial Library Foundation  
91 Coopers Farm Road  
Southampton, NY 11968-4832  
www.rmlfoundation.org

*I am interested in making a planned gift to the  
Rogers Memorial Library Foundation's endowment  
and would like to give as indicated below:*

\_\_\_\_\_  
*Name(s) please print*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Telephone*

\_\_\_\_\_  
*Email*

- WILL - OUTRIGHT BEQUEST
- CHARITABLE REMAINDER TRUST
- LIFE INSURANCE
- RETAINED LIFE ESTATE
- TRANSFERRING STOCK CERTIFICATES

PLEASE RETURN THIS FORM TO:

**ROGERS MEMORIAL LIBRARY  
FOUNDATION**

91 Coopers Farm Road  
Southampton, NY 11968-4832

*A member of the Foundation will contact you for  
further discussion and explanation of your gift.*

*Thank You*

## Planned Giving Options

### Bequests

Bequests through a will or living trust, enable you to help RMLF in the future, while retaining your assets today. Bequests can be a specific dollar amount, a percentage of your estate or the balance of your estate after providing for your family or loved ones. A bequest reduces estate tax liability by removing those assets.

### Charitable Remainder Trusts

The Charitable Remainder Unitrust and the Charitable Remainder Annuity Trust are two life income planned gift options that allow you to make a gift to RMLF and receive income from that gift for you or a designee for the rest of your life or for a set number of years while also receiving a current income tax deduction for the gift. A charitable remainder trust can be established when the donor irrevocably transfers cash, securities or real estate to fund the trust. With the transfer of appreciated securities, or real estate, the donor not only receives the charitable gift deduction, but also avoids capital gains tax. Upon termination of the trust, the remaining principal in the trust is directed to RMLF.

### Life Insurance

A gift of life insurance can be a very affordable method of giving a significant gift. By purchasing a policy naming RMLF as the owner and beneficiary, you can receive a charitable gift deduction for each premium payment. A paid up policy that may no longer be needed can also be contributed, allowing a donor to receive a charitable gift deduction approximately equal to the cash surrender value of the policy.

### Retained Life Estate

A gift of your home or real estate can be made without giving up the use of your property during your lifetime. You may also provide for your spouse or loved one to live there upon your death. You can obtain a charitable income tax deduction based on the value of the property and your age. Property taxes and insurance remain the donor's responsibility.

### Make a Gift of Stock

When you give long-term, appreciated securities to the Foundation you avoid the capital gains tax on the securities that would result if you sold the same stock and gave the proceeds to the Foundation. When donating stock you are entitled to a charitable tax deduction equal to the value of the securities on the date of transfer to Rogers Memorial Library Foundation.

# ROGERS MEMORIAL LIBRARY FOUNDATION ENDOWMENT



*A charitable, non-profit 501 (c)3 corporation  
dedicated to supporting the library*



### What exactly is an endowment fund?

An endowment fund is more than a sum of money invested to produce interest earnings—it is a sigh of relief; freedom from worry about yearly operating shortfalls; flexibility to better serve the Rogers Memorial Library. As the endowment grows, the amount of interest earned grows, and the Library's financial security increases with it. An endowment fund can provide income for the Library above and beyond that planned by the community.

An endowment fund is a no-strings attached income that will provide RMLF with greater latitude to respond to their changing needs. By creating an endowment fund, RML is insuring its ability to continue being a part of the Southampton community.



*Through a donation or planned gift, donors can reach across decades to touch future generations to ensure these goals are realized.*

### How can I contribute to the endowment fund?

There are many ways to endow RMLF. Consider a gift of cash, stock or property in memory of or to honor a colleague or friend's retirement or other personal and professional milestone.

You can use the attached form to make your gift now.

## ROGERS MEMORIAL LIBRARY FOUNDATION

91 Coopers Farm Road  
Southampton, NY 11968-4832  
[www.rmlfoundation.org](http://www.rmlfoundation.org)

*Please print name as it should appear on donor acknowledgment.*

Mr. / Mrs. / Ms. / Mr. & Mrs. / Dr.

Address

City/State/Zip

Telephone (include area code)

Email (if desired)

Enclosed is \$

Make check payable to Rogers Memorial Library Foundation

Total Gift \$

My payment option for any balance is:

Bill me (check one):  Monthly  Quarterly  Annually

In increments of \$ beginning

Charge my:  Visa  MasterCard

Card Number: Exp. Date:

Card Holder's Signature:

My gift is in memory of:

My gift is in honor of:

Name:

Corporate matching gift form enclosed