

projectSTEP

Planned Gift Intention Form

Project STEP is grateful for your generosity and foresight in supporting our program, students, and mission. To ensure that your planned gift intention is properly documented, please complete and return this form to the address below and retain a copy for your records. Please be

**Project STEP
Symphony Hall
301 Massachusetts Avenue
Boston, MA 02155**

I, _____, intend to make a planned gift of \$_____ to Project STEP. I am providing the following information as a courtesy to Project STEP so that the organization may recognize my gift intention during my lifetime, and plan with confidence for the future. I also acknowledge that my estate plans should be reviewed by a licensed attorney or financial advisor to ensure accuracy and adherence to tax law. Below are the details of my planned gift.

Bequest:

Please describe your bequest, and attach a copy of the page of your will containing the language pertaining to your bequest. Kindly provide the name of your estate executor or attorney in the accompanying correspondence. You may use the following bequest language if needed: *"I give a to Project STEP, Tax ID# 22-2505816, located 301 Massachusetts Avenue, Boston, Massachusetts the following: (specific cash amount; percentage of total estate; percentage of remaining funds; specific IRA, insurance policy or trust) Other assets may be accepted by Project STEP – Contact Project STEP for more information.*

Charitable Gift Annuity: accepted on a case by case basis

Please provide the amount of your gift, and annuitant names.

Charitable Remainder Trust: Please provide description of your gift; include the name of the fund, trustee(s), and income beneficiaries.

Charitable Lead Trust: Please provide description of your gift; include the name of the fund, trustee(s), and income beneficiaries.

Retirement Asset Gifts:

Please provide a copy of the cover page of your policy.

Life Insurance Designation:

Please provide a copy of the cover page of your policy.

Other – including real estate: accepted on a case by case basis

Please list real estate, qualified retirement fund assets, or other asset(s) you intend to give to Project STEP. Please contact Project STEP for accepted assets.

Named Endowment Fund: accepted on a case by case basis

Please provide the amount of your gift and the desired name for your endowed fund. Named funds are available for gifts of \$100,000 or more.

I would like to be recognized as:

Please print your name(s) as you would like it to appear in print. You may choose to be listed as "Anonymous".

Donor Address:

Donor Phone/Email:

Family Contact(s):

Please provide the name, address, phone, and email of your preferred family contact.

Donor Signature and Date

Project STEP Representative Signature and Date

* Project STEP funds will be unrestricted unless discussed with the donor. For questions and further information please contact Jodie McMenamin, Manager of Donor relations at 617.267.5777 or by email at jodiemcmenamin@projectstep.org

Thank you
Project STEP | 301 Massachusetts Avenue | Boston, MA 02155
617.267.5777 | projectstep.org

Bequests Accepted by Project STEP

Bequests and Beneficiary Designations under Revocable Trusts - Donors are encouraged to make bequests to Project STEP under their wills, and can do so by naming Project STEP as the beneficiary of their trusts, life insurance policies, and retirement plans. Donor estate plans should be reviewed by a licensed attorney or financial advisor to ensure accuracy and adherence to tax law. To ensure that a donor's planned gift intention is properly documented a planned giving intention form should be filled out and signed by both the donor and a representative from Project STEP (when possible).

Retirement Asset Gifts - Designating Project STEP as the beneficiary of an IRA, 401K, 403b, or other retirement plan is a flexible way to give to the organization and protect funds from taxation upon passing. Retirement assets can be changed directly through contacting the plan administrator and providing STEP's Tax ID # 22-2505816.

Charitable Remainder Trusts (Accepted on a case by case basis) - A tax-exempt irrevocable trust designed to reduce the taxable income of individuals by first dispersing income to the beneficiaries of the trust for a specified period of time and then donating the remainder of the trust to the Project STEP.

Charitable Lead Trusts - An irrevocable trust designed to provide financial support to Project STEP for a period of time, with the remaining assets eventually going to family members or other beneficiaries of the donor.

Charitable Gift Annuity (Accepted on a case by case basis) - A contract between a donor and Project STEP whereby the donor transfers cash or property to STEP in exchange for a partial tax deduction and a fixed lifetime stream of annual income. The amount received is determined by the donors age.

Life Insurance - Project STEP will accept gifts of life insurance where Project STEP is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.

Real Estate - All gifts of real estate are subject to review by the Fundraising and Marketing Committee and/or the Board of Directors. Prior to acceptance of any gift of real estate other than a personal residence, Project STEP shall require an initial environmental review by a qualified environmental firm. In the event that the initial review reveals a potential problem, the organization may retain a qualified environmental firm to conduct an environmental audit. Criteria for acceptance of gifts of real estate include: Is the property useful for the organization's purposes? Is the property readily marketable? Are there covenants, conditions, restrictions, reservations, easements, encumbrances or other limitations associated with the property? Are there carrying costs (including insurance, property taxes, mortgages, notes, or the like) or maintenance expenses associated with the property? Does the environmental review or audit reflect that the property is damaged or otherwise requires remediation?

Language for Bequests – Donor to Advisor

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