



ROOSEVELT SOCIETY LEGACY CIRCLE

The Roosevelt Society Legacy Circle was established to honor and recognize donors who've included March of Dimes in their estate plans. We also refer to these estate gifts as "planned gifts" because they combine financial planning and estate planning techniques to allow donors to make gifts to support March of Dimes while at the same time providing significant tax benefits to the donor. There's no minimum amount required to become a member and your information will remain strictly confidential.

HOW TO BECOME A MEMBER

You can become a member of the Roosevelt Society Legacy Circle by informing us that March of Dimes is named as a beneficiary in your estate plan. Here are some of the most commonly used options our donors use to make their charitable estate planning commitments:

1. Include a provision in your **will or trust** naming March of Dimes as a beneficiary of a specific amount, specific asset, percent of your overall estate or percent of your residuary estate.
2. Include March of Dimes as a beneficiary of all or a portion of your **retirement plan or IRA**. This can be accomplished by obtaining a Beneficiary Designation Form from your broker and naming March of Dimes as a beneficiary.
3. Include March of Dimes as a beneficiary of a **life insurance policy**. This can be accomplished by obtaining a Beneficiary Designation Form from your life insurance company and naming March of Dimes as a beneficiary.
4. Enter into a contract with March of Dimes to establish a **charitable gift annuity** which will pay income to you for life and allow March of Dimes to use your gift at your death.
5. Establish a **charitable remainder trust** which will pay income to you and other named beneficiaries for life or a period of years, liquidate assets free of capital gains tax, generate an immediate charitable income tax deduction, provide potential gift and estate tax savings, and pass 100% of what's left in the trust when it ends to March of Dimes.

MEMBERSHIP BENEFITS

Your membership will entitle you to receive:

- Invitations to special events and programs featuring renowned researchers and special guest speakers.
- Insider updates on March of Dimes research, programs and services.
- Recognition on our website's list of donors and in our annual report should you elect to receive recognition.

- Our Gift Legacy eNewsletter which provides helpful estate planning tips, timely information on tax law changes and stories about donors who've made a difference in enhancing our work through a charitable estate gift.

If you're interested in including March of Dimes as a beneficiary in your estate plan, or you have already included March of Dimes as a beneficiary in your estate plan, we would appreciate the opportunity to document your intentions by way of a **Revocable Gift Form** which can be obtained by contacting Dean Regenovich, Director of Charitable Estate Planning, at 800-780-3463 or plannedgiving@marchofdimes.org. You can also visit marchofdimesgift.org to download a copy of the **Revocable Gift Form**.