

Get Started Today



## MAKE YOUR IMPACT ON THE FUTURE

Thoughtfully planning for your future can feel intimidating, but it also secures a future that will make you and your family proud.

Including your favorite nonprofits, like Brucemore, in your planning creates a lasting impact and is easier than you think.

### What is a "planned" or "legacy" gift?

- Planned gifts are transfers of assets to nonprofits as a part of your end-of-life estate.
- These gifts can be a simple dollar amount or a percentage of your overall estate.
- Planned gifts can have tax benefits for your family.
- They are available to everyone, no matter your income level.
- Most gifts are revocable, so you can change your mind at any time.



**You have options!**

We are grateful you are interested in supporting Brucemore and hope this document will help you get started.

# Explore Your Options

## 01 Make a simple bequest

Typically it takes just one sentence in your will or living trust using the sample language below to include one or many of your favorite nonprofits. You can choose to leave a dollar amount or a percentage of your estate. This doesn't impact your cash now and you maintain all control.

## 03 Add to your life insurance

Life insurance accounts have beneficiaries similar to retirement accounts. These lists can be updated anytime to include new people or nonprofits as full or partial beneficiaries. Your insurance agent can help you or your may be able to update this list online, too.

You are passionate about Brucemore. Now you can guarantee that passion will live on as a part of your legacy.

## 02 Update your retirement

Simply update your qualified retirement account or IRA beneficiary list to add Brucemore for a percentage of the value. Many donors choose to leave 1-10% of the remaining amount alongside their children and other family. You can often update this form online!

## 04 Create an endowment

If you have assets now that you'd like to donate and are looking for a cash-smart and forward-thinking way, consider creating an endowed, donor-advised fund for Brucemore at the Greater Cedar Rapids Community Foundation. Your donation will continue to spin off funds to your favorite nonprofit forever.

There are more options available to fit your specific needs. Contact us to explore what works for you.

## Sample Bequest Language

"I give to Brucemore, Inc, EIN 42-1170531, a nonprofit currently located at 2160 Linden Drive SE, Cedar Rapids, IA 52403, \$\_\_\_\_\_ [or \_\_\_% of my estate] to support its area of greatest need."



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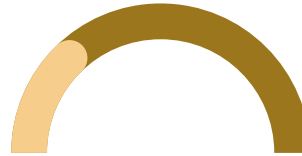
# Create Your Plan

Planned gifts create a legacy by instilling the value of giving back to future generations.



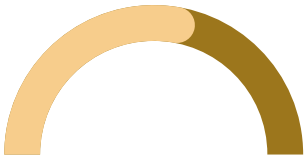
## Make a list

Start by listing your assets such as your home, bank accounts, retirement accounts, and insurance to ensure you have a clear picture of the possibilities.



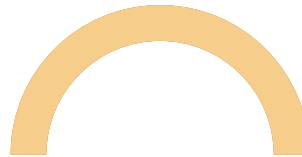
## Determine your goals

Goals help you allocate your resources. First, consider your values then write down your vision for the future and explore how local nonprofits can help.



## Involve your family

Gather your family and discuss your goals and vision together. These discussions often lead to insights you might miss otherwise.



## Contact the experts

An attorney or financial advisor can help you craft a plan with tax benefits to you and your heirs. They can also work directly with nonprofits to ensure success.



## Why Brucemore?

You already enjoy the site and its programs. You have memories of this place that span generations. Now is your opportunity to think about what's next for Brucemore and for you.



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# Look To The Future

A planned gift to Brucemore is more than a future donation; it is a promise that the history, creativity, and spirit of this special place will last for generations.

By taking steps now, you can make a lasting impact that reflects what matters most to you and become part of a bigger community story.

## Consider Brucemore

The value of a planned gift to Brucemore is simple: a stronger organization and a more robust future.

Your gift will:

- Create growth – building a solid foundation for future programs, projects, and outreach.
- Strengthen the base – anticipating future unexpected needs in preservation and maintenance.
- Sustain the future – ensuring continued inspiration in our community.



Contact us today!

Reach out to [support@brucemore.org](mailto:support@brucemore.org) or 319-362-7375 and discuss your ideas on how best to create your legacy or let us know if you have already included Brucemore in your plans.