

## SMART Reading Legacy Society Membership Form

Thank you for your interest in making a lasting gift to the well-being of Oregon's children through SMART Reading. Contributors who include a provision for SMART in their estate plans become members of SMART Reading's **Legacy Society**. When you add SMART to your estate plan, we invite you to share the news with us by completing and returning this form. **This documentation ensures that your wishes are accomplished.** Your information will be retained in SMART's **confidential** files.

Name \_\_\_\_\_ Birthdate \_\_\_\_\_  
(Please type or print)

Name of Spouse/Partner \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

SMART Reading is named a beneficiary in my/our:

- Will or trust
- Retirement plan (IRA, PERS, other)
- Life insurance
- Charitable trust or annuity
- Designated fund (examples: Schwab Charitable or The Oregon Community Foundation)
- Other (please describe \_\_\_\_\_)

### **Estimated value of the provision: (optional)**

Please provide a good faith estimate of the dollar value as of the date this form is signed. (Your estimate is important as we strive to make plans for the future.) \$ \_\_\_\_\_

Requests of all sizes are welcome. Requests of \$50,000 or more designated for endowment will provide reading support and books for SMART children for generations to come and can establish a permanent fund in honor or memory of a loved one.

- Please contact me regarding establishing a named fund.

Additional instructions  
\_\_\_\_\_  
\_\_\_\_\_

- I would be proud to be acknowledged. Please list my/our name as follows:  
\_\_\_\_\_

- I prefer to remain anonymous.

Thank you and welcome to the SMART Reading Legacy Society!

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If you have questions about this form or would like to discuss your plans, please contact Sharon Benson, Senior Development Officer at [sbenson@SMARTReading.org](mailto:sbenson@SMARTReading.org) or 971-634-1620. Please mail your completed form to: SMART, 101 SW Market St, Portland OR 97201. SMART's **Tax ID number is 93-1051724.**

## Ways to leave a Legacy for SMART Reading

1. Add SMART Reading to your **will** or trust using specific language such as “I give to SMART Reading (tax ID #93-1051724), a nonprofit corporation located at Portland, Oregon, for its (general or endowed purposes) \_\_\_\_\_ (dollar amount, percentage of estate, or residue of estate).
2. Name SMART Reading as a **beneficiary of a retirement savings plan or life insurance policy.\*** Submit a “change of beneficiary from” to your fund administrator. You may need the following:

Name of beneficiary: SMART Reading  
Birth: 01.01.1991 (our founding year)  
Tax ID number: 93-1051724  
Address: 101 SW Market Street, Portland, Oregon, 97201

*\*Note: if you have life insurance and your employer issues you an additional plan, consider naming SMART Reading the beneficiary of your employee-issued plan. Also, retirement funds left to heirs are taxed. Retirement funds left to charity are not.*

3. If you have or are considering establishing a **designated fund** (“DAF”/donor advised fund) at your community foundation or charitable giving administrator, let your representative know that you intend to leave SMART a legacy gift. The representative should have suggestions of how you can accomplish this with a simple amendment or provision.
4. If you are over 55 years old and have highly appreciated stock or real estate, you might consider donating your asset to SMART in order to fund a **charitable gift annuity or charitable trust**. In exchange for your gift, you and a loved one receive an income for the rest of your life. When you make the gift, you enjoy significant tax savings, and, when you are gone, the gift passes to SMART.

Your legacy gift supports SMART’s sustainability efforts and qualifies you for membership in SMART Reading’s Legacy Society. As you are completing the plans for your legacy gift, include in your paperwork SMART’s Legacy Society membership form (over). Submitting the membership form to SMART is an important, complementary step to ensure that your intentions are stated clearly and accomplished.

Bequests of any size are welcome. Bequests of \$50,000 or more may establish a fund named for a loved one.

***Please note: The information provided here is not intended to be tax or legal advice. Please consult your financial advisor before making changes in your estate.***

Contact Sharon Benson at [sbenson@SMARTRead.org](mailto:sbenson@SMARTRead.org) or 971.634.1620 for more information

