



# PLAN TODAY

**ENSURE THE ASPEN INSTITUTE  
AND YOUR LEGACY WILL ENDURE**

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Creating a planned gift can accomplish several personal goals at once. You may initially be motivated to learn about the topic as a result of a planning or tax quandary. As part of a collaborative process, you can take great satisfaction in knowing your commitment will benefit both you and the Aspen Institute.



One of many outcomes is to ensure that the Aspen Institute is successfully positioned for decades to come.

# PLAN YOUR LEGACY

**ASPEN LEGACY FUND**  
a planned giving initiative



# PLANNED GIFTS

## ARE TAILORED TO AN INDIVIDUAL'S UNIQUE CIRCUMSTANCES

Below is a sampling of ways to give. Whether you are beginning estate planning or revisiting plans completed years ago, the Aspen Institute welcomes the chance to explore a planned gift with you.



**BEQUESTS GIFTS.** A charitable bequest is one of the easiest ways to leave a lasting impact. A set dollar amount, a percentage, or a residual of the estate are all ways to direct a gift.



**RETIREMENT ACCOUNTS.** Naming the Aspen Institute to receive any portion of your unused or remaining retirement assets is one of the most tax-advantaged ways to make a legacy gift.



**CHARITABLE REMAINDER TRUSTS.** Whether it be a traditional Remainder Trust or a Lead Trust, these powerful planning techniques can accomplish many goals simultaneously.



**ART AND COLLECTIONS.** Substantial appreciation may be associated with assets that reflect your interests and hobbies, along with undesired estate taxes. Heirs may have collectable preferences that differ from yours. Your valuable possessions can be used to fund a charitable gift through your estate.



**REAL ESTATE.** Contributing partial or whole ownership of real estate can be a planning solution while funding a legacy gift.

### LET US HEAR FROM YOU

Your nest egg is filled with your values. Our work is values-based too. Please contact us to discuss about how your legacy gift can ensure the enduring impact of our shared values.

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The above information is intended to provide general information. It is not intended nor should it be relied upon as legal or tax advice. You are encouraged to contact qualified professional advisors to discuss your estate plans to be sure your wishes for family and the Aspen Institute are properly documented.

# PLAN TODAY WITH YOUR BEQUEST

ENSURE THE ASPEN INSTITUTE  
AND YOUR LEGACY WILL ENDURE



Walter Paepcke, Founder of the Aspen Institute, combined his values with his vision to create a lasting legacy for generations to come. We now benefit from the seeds he planted. Today, your decision to make a bequest can plant more Aspen seeds for those who follow.

A bequest allows you to retain control of your assets during your lifetime, while providing you with the satisfaction of knowing your designated assets will be directed to the Aspen Institute.

Bequests can be designed in several ways: a specific dollar amount, a specific percentage of your estate, or the most powerful gift: a combination of the former and a portion or entirety of what remains after provisions have been made for other beneficiaries.

#### SAMPLE BEQUEST LANGUAGE:

"I give and bequeath \_\_\_\_\_ [dollar amount, percentage of my estate and/or a percentage of my residuary estate, etc.] to the Aspen Institute (Federal Tax ID#84-0399006), a 501(c)(3) nonprofit corporation under the laws of the State of Colorado, and with headquarters at 2300 N Street, NW, Suite 700, Washington, DC 20037."

#### LET US HEAR FROM YOU

We can help establish your legacy with a planned gift that is right for you.

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JOIN THE ASPEN LEGACY SOCIETY  
TO ENSURE THE ASPEN INSTITUTE  
AND YOUR LEGACY WILL ENDURE



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**THE ASPEN LEGACY SOCIETY** is our way of recognizing and celebrating individuals who leave a bequest or create a planned gift for the Aspen Institute. By sharing your bequest intention with us, it allows you to experience our sincere gratitude. Additionally, a decision to publicize your generosity opens the door for others to be inspired. No matter the comfort level in sharing your gift, we look forward to a lasting partnership as we strive to build a more free, just, and equitable society.



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