

## FAQ

### CONSIDERING A PLANNED GIFT?

Planned giving allows donors to invest in the future of the organizations they love, and Loveland Living Planet Aquarium (LLPA) is uniquely positioned to assist you. Review the information below as you consider establishing your gift, and contact us with any questions about how we can help you strategically accomplish your future financial and charitable objectives.

### WHO CAN MAKE A PLANNED GIFT?

Anyone with a desire to give can make a planned gift. Generally, donors give assets like IRAs, securities, real estate, insurance benefits and cash. Many are surprised to learn how easy it is to create a lasting legacy that can preserve the family name, honor loved ones, support a favorite program, minimize tax burdens, and/or support the community they call home. Bequests to the aquarium are exempt from estate taxes.

### WHAT GOOD WORK CAN I DO WITH MY PLANNED GIFT?

You can support the Aquarium's day-to-day operations, or you may be interested in a gift to LLPA's endowment fund or to support a particular aquarium program such as education or conservation. Often donors find it most satisfying to provide a gift with flexibility. By making an unrestricted gift, you ensure that your gift will provide the maximum benefit to the aquarium. It will be used to respond to the prevalent needs of the aquarium generation after generation.

### HOW WILL THE PROCEEDS OF MY FUND BE USED TO BENEFIT THE AQUARIUM?

Loveland Living Planet Aquarium will use the distribution to support your wishes.

### HOW DO I INCLUDE THE GIFT IN MY ESTATE PLAN?

Anytime you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your financial or legal advisor can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes and other considerations.

### HOW DO I PLAN AN ESTATE GIFT?

Call your financial advisor, estate planner, or the aquarium team directly (Robert Castellano, VP of Development and Philanthropy, or Allison Barker, Associate Director of Development). They'll help show you how easy it is to get started, and without pressure or obligation. Giving a planned gift is very simple:

- You include a bequest or planned gift to Loveland Living Planet Aquarium in your will and notify us.
- Another easy options is to name us as a beneficiary to your life insurance policy or your retirement plan and notify us.
- Other methods such as charitable trusts, donor-advised funds and community foundations exist and may also provide current tax benefits. We can help you explore these options further, if desired.

### WHEN SHOULD I INCLUDE THE GIFT IN MY ESTATE PLAN?

The process is very simple. Once you have made provisions for naming the aquarium as a beneficiary, please complete a Planned Giving Statement of Intent that clarifies your commitment and communicates your wishes. As an additional alternative, some donors decide to establish a fund during their lifetime. It allows them to begin seeing the impact of their giving and serves as the repository of their future planned gift.

