

LEAVE A LEGACY OF SUPPORT FOR UPH

Name UPH as a beneficiary:

... IN YOUR WILL

Benefits: You can make a significant future gift to UPH without affecting your current lifestyle, and you will be able to reduce your estate taxes, too. Unrestricted bequests to UPH can be a percentage, a specific dollar amount, or a specific asset.

- Make a **percentage bequest** by leaving a percentage of your estate or a percentage of your residuary estate in your will.
- Make a **general bequest** by leaving a specified dollar amount to UPH in your will.
- Make **specific bequest** by designating a specific asset that you want UPH to receive. A bequest of 1,000 shares of GE stock, for example, is a specific bequest.
- Use a **residuary bequest** to give UPH all or a portion of your estate after all other obligations have been paid.

Sample will language: I give and bequeath to Universal Preservation Hall, a not-for-profit corporation with principal offices located at 25 Washington Street, Saratoga Springs, NY 12866, the sum of \$____ (or ___% of any residuary estate) to be used for general charitable purposes.

... OF YOUR LIFE INSURANCE

You can name UPH as a beneficiary of all or part of the proceeds from a **life insurance** policy but retain ownership.

This way, you can make a substantial gift to UPH on an installment basis by making a series of modest payments during your lifetime.

Benefits: You will be able to deduct the premium payments as charitable contributions.

Added Benefits: Although the face value of the policy will be included in your gross estate at your death, your estate will be entitled to an offsetting charitable estate-tax deduction.

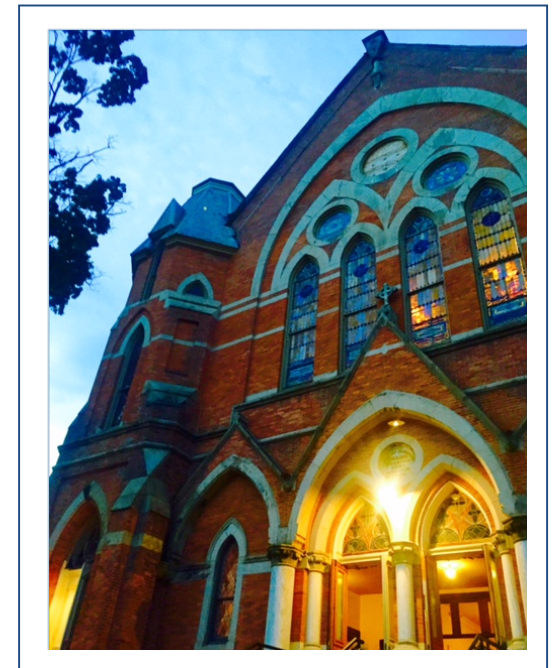
Added Benefits for UPH: A gift of life insurance is certain and the proceeds are paid promptly without going through the time-consuming process of probate.

Also think about: You could give UPH a paid-up policy or a new policy and reduce your estate and inheritance taxes by distributing part of your net worth during your lifetime.

... OF YOUR RETIREMENT PLAN

You can designate UPH as the beneficiary of all or part of your **retirement plan assets**. That is all you have to do! You don't have to change your will.

Benefits: Designating UPH as a beneficiary of your retirement IRA, avoids income tax and estate tax on those retirement-plan assets because UPH is a tax-exempt organization.



Securing the future

Planned giving, in addition to fulfilling your philanthropic goals, may offer benefits such as reduced income tax, avoidance of capital gains tax, and reduced estate tax.

You can provide a different kind of gift that benefits you and your family while ensuring that UPH will continue to serve Saratoga & the Capital Region for generations to come.

Unrestricted gifts are encouraged. UPH will review all restrictions before accepting a gift to assure it is acceptable to UPH and to ensure that UPH can honor the donor's intent.

Your own tax and legal advisors can best guide you in this regard. This outline is prepared as a guide to planning. As you consider a legacy gift to UPH, we encourage you to consult your own tax, legal, accounting, and other professional advisors as you consider the best possible ways to benefit your individual tax situation.

For more information about making a legacy gift, please contact:

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Dan Hanifin, Relationships Director
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Universal Preservation Hall
25 Washington Street
Saratoga Springs, NY 12866
www.universalpreservationhall.org



If you have already included UPH in your estate plans, thank you!

Please let us know so that we may properly acknowledge your gift.



Create Your Legacy

**Help secure the future of UPH
by naming UPH as a
beneficiary of your estate,
life insurance or
retirement plans.**