



Thank you for your interest in including Connecticut Public in your estate plans. You will find three documents below:

- Legacy Society Information
- Planned Giving Commitment Form
- Suggested Bequest Language

All donors who include Connecticut Public in their estate plans are included in our Legacy Society. This society recognizes the commitment and generosity of those who have remembered our organization in their will or estate plans. You can also choose to remain anonymous if you wish.

All planned gifts are added to Connecticut Public's Endowment Fund unless otherwise specified, making your contributions a truly legacy.

If you are thinking about making a charitable gift in your will or other plans, we would be pleased to share more information and discuss options that will best suit your individual needs. You are welcome to contact me at (860) 275-7250 or email me at lwrubleski@ctpublic.org.

Connecticut Public is honored that you turned to us for such an important planning need. Because of special people like you, this station has been able serve our community for nearly 60 years. We look forward to serving you, your family, and your friends for many years to come.

Sincerely,

A handwritten signature in purple ink that reads "Lisa Wrubleski".

Lisa Wrubleski
Manager, Donor Relations & Planned Giving

LEGACY *Society*

Our Legacy Society was created to recognize and thank donors who have made provisions in their estate plans for a gift to Connecticut Public, recognizing that the gift may be postponed until after their lifetime. The name Legacy Society was chosen to acknowledge that the benefits of such gifts create a perpetual legacy for our organization.

Benefits

Donors who become members of this group can be certain the future of public media will profit from their foresight and generosity. Members' names are listed in various materials, unless they request that their intentions be kept confidential. From time to time, selected Legacy Society members will also be featured, **with their permission**, in planned giving articles in our publications.

Upon expressing their intentions, donors receive letters of acknowledgment and gratitude from our organization and specifically from our President/CEO, Mark Contreras.

Membership

There are several ways by which donors become Legacy Society members. They include:

Bequest- A provision of one's estate plan (will or living trust) that includes Connecticut Public as a beneficiary. Examples of this are:

- Specific bequest of money or property;
- Residual bequest of the remainder of the estate after specific bequests;
- Contingent bequest (gift occurs only if named beneficiaries die before the donor).

Planned Gift- An irrevocable gift that provides a donor (and/or others) with a life income or other benefits and specifies Connecticut Public as the charitable beneficiary.

Life Insurance- A donor may:

- Take out a policy naming Connecticut Public as the beneficiary (which is revocable);
- Take out a policy naming Connecticut Public as *owner* and beneficiary, (which is irrevocable);
or
- Change the provisions of an existing policy, by naming Connecticut Public as the beneficiary of the policy or by transferring ownership of the policy to our organization.

Qualified Retirement Plan- A tax-deferred retirement plan [IRA, 401(k), 403(b) etc.] is a great way to provide for retirement years and reflects wise planning. However, as much as 80% of its remaining principal value can be taken in taxes upon death when a natural heir or other person is named as beneficiary. Persons who select Connecticut Public as the beneficiary can avoid all those taxes, and can leave other, lower-taxed assets to family members. Your plan administrator can provide the beneficiary designation forms needed.

Authentication

When donors inform us they have included Connecticut Public in their estate plans, they are encouraged to fill out a commitment form (enclosed) and provide documentation of their intentions. Such documentation would include a copy of the will or living trust (or at least the portion pertaining to the Connecticut Public bequest) or, in the case of life insurance, retirement plan or life income plan, a copy of the beneficiary designation.

Donor Information

Everyone has a life story. Donors are encouraged to share their story with us, by filling out and returning a donor testimonial form. This will be placed in their permanent file at Connecticut Public and will be made available to be used in marketing materials, serving as a reflection of your values and an inspirational message to those considering doing the same. If you are interested in sharing your story, please contact Lisa Wrubleski, Donor Relations and Planned Giving Manager at lwrubleski@ctpublic.org.

Uses of the Gifts

Legacy Society members, like all donors to Connecticut Public, are free to designate the area(s) within our organization where their gift is to be used and applied. All planned gifts will be added to Connecticut Public's Endowment Fund unless otherwise specified.

Legacy Society members are valued for their foresight, their loyalty, and their deep spirit of caring about the future of public media. It is our hope that members feel a special sense of pride and accomplishment in being a part of this unique and visionary group.

For further information:

Lisa Wrubleski, Manager, Donor Relations & Planned Giving

Connecticut Public

1049 Asylum Avenue, Hartford, CT 06105

lwrubleski@ctpublic.org

(860) 275-7250



Connecticut Public
 Attention: Lisa Wrubleski
 1049 Asylum Avenue
 Hartford, CT 06105
 lwrubleski@ctpublic.org

Federal Tax ID #:06-0758938

Planned Giving Commitment Form

The **Legacy Society** program recognizes the commitment and generosity of those who have remembered Connecticut Public in their will or estate plans. Your gift will serve as a living legacy and ensure the future of excellence in public broadcasting.

Thank you for sharing the news of your planned gift. This document is a helpful tool that assists us in ensuring the best possible stewardship of your generously planned gifts to our organization. This is not a legal document. The information you provide will assist our planning and inform us of your recognition wishes. You may include as much or as little information as you wish.

I/we have made provisions for Connecticut Public in my estate plans as follows:

- | | | |
|---|---|--------------------------------|
| <input type="checkbox"/> Bequest in my will | <input type="checkbox"/> IRA | <input type="checkbox"/> Trust |
| Specific amount \$ _____ | <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Other |
| Percentage of my estate _____ % | | |

Estimated value of gift \$ _____

Notes: _____

I/we would like to be listed in any publication/on-air recognition in connection with the **Legacy Society** program as _____

I/we wish to remain anonymous

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone : _____ Date: _____

Signature: _____

If you are comfortable sharing your planning documents, please attach copies of your will, trust provisions or any designation forms naming Connecticut Public as a beneficiary for our records.



Recommended Bequest Language

When making or revising a will, you should obtain the assistance of an attorney. The staff at Connecticut Public will be pleased to work with you and your professional advisor(s) to design an estate plan specifically tailored to your wishes. You are encouraged to make your gift to Connecticut Public, Tax ID: 06-0758938.

The following are suggested forms for making your bequest:

Outright bequest in will

I bequeath the sum of \$_____ (or legal description of property, percentage of estate, all/or percentage of the remainder of your estate) to Connecticut Public, 1049 Asylum Avenue, Hartford, CT 06105 for its general purposes (or for a designated purpose).

Conditional bequest in will

If (one or more individuals) does not survive me, I bequeath the sum of \$_____ to Connecticut Public, 1049 Asylum Avenue, Hartford, CT 06105, for its general purposes (or for a designated purpose).

For further information please contact:

Lisa Wrubleski, Manager, Donor Relations & Planned Giving
Connecticut Public
1049 Asylum Avenue
Hartford, CT 06105
Phone: (860) 275-7250
Email: lwrubleski@ctpublic.org