

CHARITABLE REMAINDER TRUST

A charitable remainder trust (CRT) is another form of life income gift that allows you to provide an annual income for yourself, either for life or for a fixed term of 20 years or less. You may identify the terms and conditions of fulfillment and determine what portion of the estate is remitted to a loved one (after expenses). Remaining assets in the trust will be gifted to the Aquarium. You may also add funds to the trust whenever you like.

Sample charitable remainder trust language for trust documents:

"I give the rest, residue and remainder (or ____% of the rest, residue and remainder) of my estate to the Oregon Coast Aquarium in Newport, Oregon for its permanent Endowment Fund. The net appreciation there from, as defined by the Oregon Community Foundation (steward of the endowment), is to be expended as determined by the Aquarium's Board of Directors."

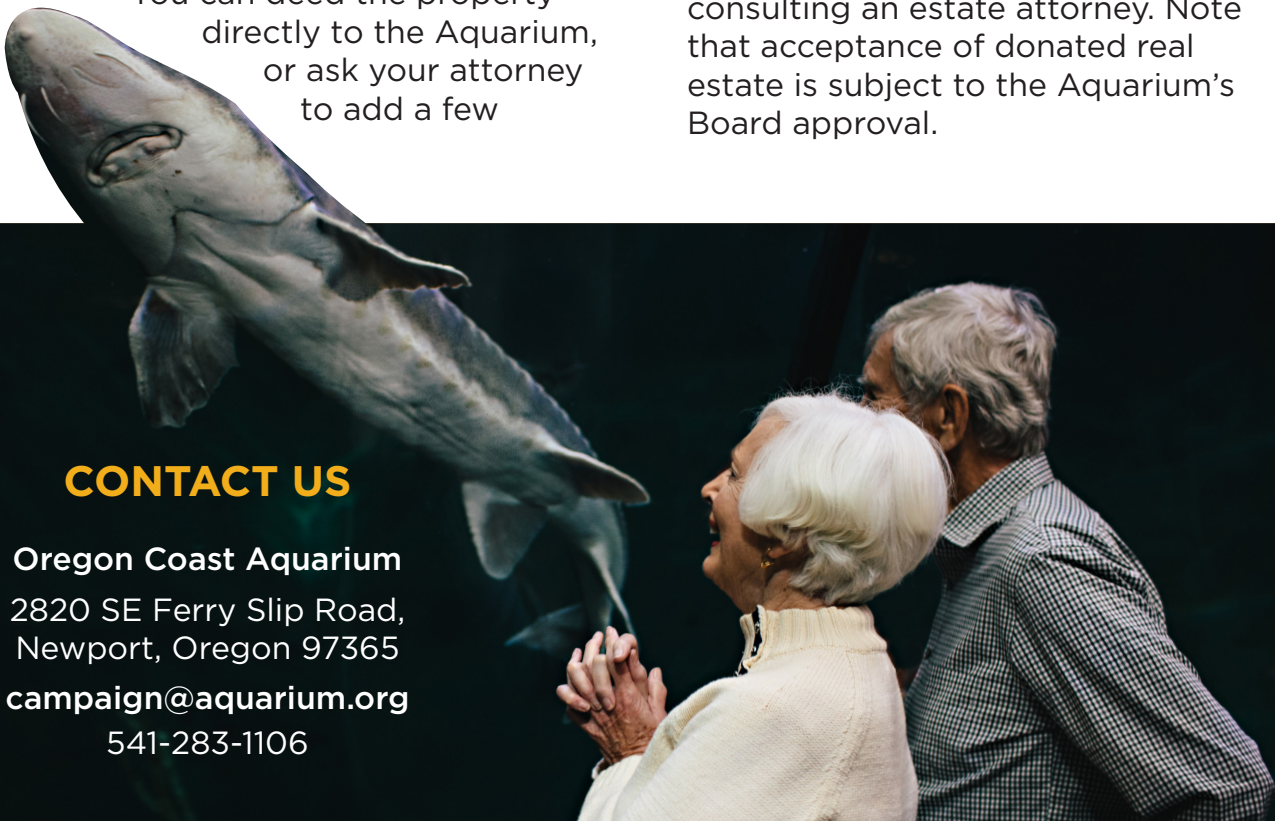


REAL ESTATE

Consider donating real estate, such as a personal residence, vacation home, farm, commercial property or undeveloped land. When you give the Aquarium appreciated property you have held longer than one year, you qualify for a federal income tax charitable deduction, and you may minimize or eliminate capital gains tax.

You can deed the property directly to the Aquarium, or ask your attorney to add a few

sentences in your will or trust agreement to make the Aquarium a beneficiary. You may also make an outright property donation, or a gift with a retained life estate, enabling you to live in your home for as long as you wish, thereby avoiding property or estate tax liability. Our partner, Oregon Community Foundation, can help with gifts of real estate, but please consider consulting an estate attorney. Note that acceptance of donated real estate is subject to the Aquarium's Board approval.



CONTACT US

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LEAVE A LEGACY

SEA STAR PLANNED GIVING

Sea Stars are known for their ability to regenerate cells, sparking new growth. When you become a Sea Star legacy donor with a planned gift, you ensure growth and strength for future generations.



PLANNED GIVING TO SUPPORT NOW & LATER

True legacy includes the values as well as the capital we leave for future generations. The Oregon Coast Aquarium relies on philanthropic support to enhance programs, sustain exhibits, improve facilities and care for thousands of animals.

Whether planning your financial future, retirement or estate, you have multiple options that can support both your altruistic ideals and economic goals. We invite you to consider one or more of these special ways to make a gift of a lifetime:



IRA QUALIFIED CHARITABLE DISTRIBUTIONS

IRA “rollovers” offer tax advantages when you transfer a gift directly from your 401K, 403B or IRA to the Aquarium. This is especially optimal for donors aged 70 or older, and are required to take annual

minimum distributions. You are not required to pay income or capital gains taxes on the amount transferred to the Aquarium, up to \$100,000 per year.

BEQUESTS

A bequest made through a donor’s will, living trust, or beneficiary of a retirement plan or insurance policy is the most common and direct form of a planned gift.

Bequests may be unrestricted contributions or state a designated purpose. They may be in the form of cash, stock or property (conditions apply). You can establish a bequest through your financial advisor or estate attorney.

SAMPLE BEQUEST LANGUAGE:

I give, devise, and bequeath:
[describe assets to be gifted] to the Oregon Coast Aquarium, IRS tax ID #93.0877807, an Oregon nonprofit corporation is a 501(C)(3) charitable organization.



LIFE INSURANCE

Your insurance agent can assist you in naming the Aquarium as a beneficiary on a life insurance policy. You can make annual contributions to the Aquarium by paying the insurance premium, and this gift will not diminish other investments or assets earmarked for loved ones.

KARLE’S AQUARIUM FUND FOR FOSTER FAMILIES

Dr. Dan Lewer is a foster parent and veterinarian who provides animal care and marine wildlife rehabilitation for the Aquarium. He and his wife wanted to make experiences like the Aquarium affordable for children in Oregon’s foster care program, and created a fund to underwrite admissions. Rather than expend the funds until depleted, the Lewers and the Aquarium set up an endowment that would generate an annual revenue stream, guaranteeing free admission for at least 40 foster families each year.



ENDOWMENTS

Sea star legacy donors may establish endowments or trusts that make periodic or final distributions to the Aquarium.

We created the Oregon Coast Aquarium Endowment Fund in 2019 with a bequest from a former board member and annual contributor, who wanted his support to continue long after his passing. He chose to make the endowment earnings unrestricted for the Aquarium to utilize where needed most.

We partner with the Oregon Community Foundation so that you may support the Aquarium in perpetuity by building on our permanent endowment fund, or establish your own endowment for a designated purpose.

- Suggestions include:
- Funding Veterinary Care
 - Supporting School Outreach
 - Underwriting Admission for Low-Income Families
 - Financing Special Exhibits

CHARITABLE GIFT ANNUITIES

A charitable gift annuity (CGA) is a life income gift that allows you to contribute to the Aquarium, while also enjoying income for life (or a certain number of years). Assets can be liquidated and invested by transferring them into a trust

or annuity. You can obtain an income or estate tax benefit and defer capital gains on the sale of an appreciated asset. Creating these as irrevocable contracts between you and the Aquarium is easy to set up with your financial advisor or estate attorney.

