



KIRKWOOD
SCHOOL DISTRICT
FOUNDATION

Supporting Education Since 1989

PLANNED
GIVING

*Your legacy will benefit the students
of the Kirkwood School District*



Kirkwood School District Foundation - A community of parents, friends, alumni and staff with a common goal

The Kirkwood School District Foundation (KSDF) is a group of parents, alumni and friends working to build a stronger community by raising private funds to enrich the educational experiences for all students in the Kirkwood School District. We are delighted that you are considering a planned gift to support our mission. Your planned gift can benefit a restricted purpose (for example, establishing a Named Awards Scholarship at KHS at \$20,000 or more, or to specifically support the Walker Natatorium Legacy Fund), or an unrestricted purpose (a gift to support the general mission, purpose and programs of KSDF).

KSDF is a tax exempt, 501c3 charitable organization, thus planned gifts to KSDF can potentially result in tax savings for you and/or your estate. We strongly advise you to consult with your legal and tax counsel when considering a planned gift.



Planned giving options support students

Wills and Bequests

A gift via will or bequest is an ideal way to ensure that your and your family's needs are taken care of during your lifetime while benefiting a valued charity such as KSDF after your passing. The following suggested language may be discussed with your legal counsel while developing your will or trust:

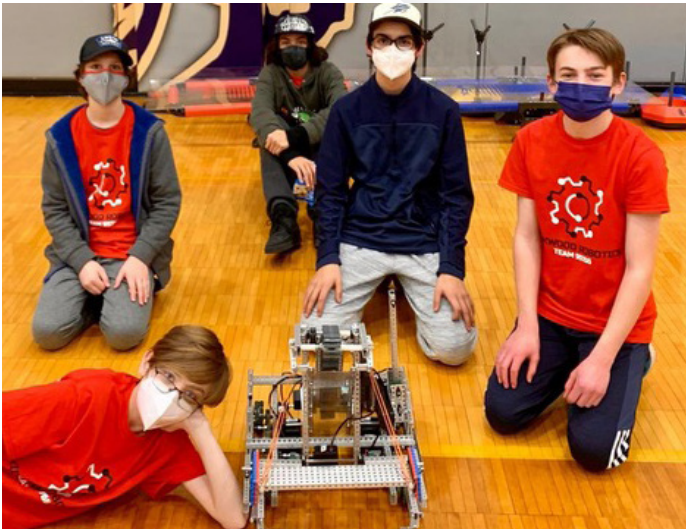
- **Unrestricted Bequest** - "I give and bequeath to Kirkwood School District Foundation, Federal EIN # 43-1526652, (please insert dollar figure or estate percentage), for the use and benefit of the mission and general purposes of the Kirkwood School District Foundation."
- **Restricted Bequest** - "I give and bequeath to Kirkwood School District Foundation, Federal EIN# 43-1526652, (please insert dollar figure or estate percentage), to establish the (for example, the John Doe Named Award Science Scholarship)."



Beneficiary Designations

You can promote our work and benefit future generations of Kirkwood School District students by designating the Kirkwood School District Foundation as a beneficiary on your bank account, certificate of deposit, IRA, fully-paid life insurance policy or your brokerage account by listing the following on your institution's or IRA custodian's beneficiary form:

Kirkwood School District Foundation
EIN # 43-1526652
1099 Milwaukee Street
Kirkwood, MO 63122



Stock Gifts

If you hold long-term (purchased more than one year ago) publicly traded securities, you may be able to benefit the Kirkwood School District Foundation while avoiding capital gains tax and obtaining a potential federal charitable tax deduction (if you itemize) on the fully appreciated value of your stock.

Charitable IRA Gifts

If you are 70½ or older, you may make Qualified Charitable Distributions (QCDs) from your Individual Retirement Account (IRA). The maximum annual amount that can qualify for a QCD is \$100,000. This applies to the sum of QCDs made to one or more charities in a calendar year. (If, however, you file taxes jointly, your spouse can also make a QCD from his or her own IRA within the same tax year for up to \$100,000.)

For a QCD to count towards your current year's Required Minimum Distribution, the funds must come out of your IRA by your distribution deadline, generally December 31. A QCD does not qualify for a charitable deduction (if you itemize on your federal return), nor counts as taxable income in the tax year when you execute the gift.

To make a QCD gift from your IRA, please inform your IRA custodian that you intend to make a Qualified Charitable Distribution directly to Kirkwood School District Foundation, Federal EIN # 43-1526652. The check should be made payable to "Kirkwood School District Foundation" and be sent DIRECTLY from your IRA custodian to the attention of Stephanie Collet at the following address: ATTN: Stephanie Collet, Kirkwood School District Foundation, 1099 Milwaukee Street, Kirkwood, MO 63122. *Failure to send the check directly from your IRA custodian to a charitable organization could result in a taxable event.*

Please request that your IRA custodian include a cover letter or note identifying you as the donor and providing your mailing address so we may promptly acknowledge your gift.

Please contact Stephanie Collet at the Foundation Office by email at stephanie.collet@kirkwoodfoundation.org, or 314-213-6123, or Tim Schulze, KSDF Treasurer, at 314-249-8107, for a confidential discussion.

Together, we are enriching the educational experiences for all Kirkwood School District students. On behalf of our students, faculty and staff, Thank you!



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kirkwoodfoundation.org

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 Kirkwood, MO 63122
 314-213-6123

email: info@kirkwoodfoundation.org

