Vail Mountain School Planned Giving

GIFT TYPE	HOW DOES IT WORK?	BENEFIT TO YOU
Bequests	Name Vail Mountain School as a beneficiary in your **will** or **living trust**. Include one or two sentences in your will or living trust that leaves to Vail Mountain School a specific item, an amount of money, a gift contingent upon certain events, or a percentage of your estate.	Your gift costs nothing in your lifetime. The donation is exempt from federal estate tax.
Beneficiary Designations	Name Vail Mountain School as a beneficiary to receive assets, such as a **retirement plans and life insurance policies** after you're gone. It's easy and flexible. Fill out a form that is entirely separate from your will and you can adjust beneficiary designations at any time.	The donation is exempt from federal estate tax.
Charitable Gift Annuity	**Gift annuities** serve as contracts between Vail Mountain School and you, the donor. We agree to pay a fixed sum of money to you for the duration of your life. Afterwards, the remainder is left to Vail Mountain School.	Your gift supports Vail Mountain School while also guaranteeing you a stream of income or the rest of your or a loved one's life. Gift annuities allow for an immediate charitable tax deduction.
Real Estate	There are several ways to make a gift of **real estate** — including an outright gift, bequest, a retained life estate, or a bargain sale (to name a few) — each with differing benefits based on your goals.	When you donate appreciated property, you have held longer than one year, you get a federal income tax charitable deduction and avoid paying capital gains taxes.
Memorial/ Tribute Gifts	Give a **memorial or tribute gift** in honor of a loved one (or yourself) and inspire philanthropy in others. Any charitable gift you arrange can be made in honor of someone, whether given today or through your will or living trust.	You can honor a friend or loved ne and receive financial benefits from your contribution.
Donor Advised Funds	Avoid the complexities of managing a private foundation by setting up a **donor advised fund**. Transfer cash or other assets to that fund, operated by a tax-exempt sponsoring organization, and then recommend—but not direct—how much and how often money is granted to Vail Mountain School.	Donor advised funds allow you to centralize and simplify your charitable giving, as well as take an immediate tax deduction without having to choose charity benefactors right away.

Ready to Donate? Contact Colleen B. Davis, Director of Advancement | 970.477.7185 | colleen@vms.edu

This brochure was developed by Vail Mountain School, a 501 (c) non-profit organization. The school is not engaged in rendering legal or tax advice. For advice and assistance, please consult an attorney or professional advisor. When consulting your advisor, the school's legal name is Vail Mountain School, 3000 Booth Falls Rd. Vail, CO. EIN #84-0533775.uuut77hpg6f6it