

# Planned Gifting

## To ensure the future of New Dungeness Light Station

For more information about a planned gift to the New Dungeness Light Station, please call the General Manager at (360) 683-6638,

The New Dungeness Light Station (NDLS) is a unique community treasure. One of the oldest continuously occupied buildings in Washington State, built while Washington was still a territory and now on the register of Historic Places, it reminds us of an era that is past. A planned gift to New Dungeness Light Station Association (NDLSA) allows you to ensure that it stays intact and available to future generations. There are a number of ways that you can ensure that this Northwest icon endures.

### Wills and Living Trusts

The most common way of making a charitable planned gift to NDLSA is through a bequest in your will or living trust. Bequests are simple to arrange, offer flexibility, and can reduce estate taxes. And with a gift through your will or living trust, you retain full use of your gift property during your lifetime, while still making a significant gift to NDLSA

### Gifts of Appreciated Securities

Make a gift to NDLSA by transferring appreciated securities instead of writing a check! By doing so, you may avoid the tax due on the capital gain AND you may receive an income tax deduction for the fair market value of the security.

For example, if you give stock with a fair market value of \$1000 for which you paid only \$100, the "cost" to you for making the gift is only \$100! Plus, you may be able to deduct the full \$1000 from your income tax, thereby reducing your "cost" even further.

To donate stocks that are held in your brokerage account (at your brokerage house), simply provide your financial advisor with the following information:

Edward Jones Company  
Depository Trust Corporation: #0057

Account #: 730-11509-1-3

PLU Federal Tax ID #: 91-1634553

Contact Information:

Cheryl Gray

Edward Jones Company

P O Box 2166

Sequim, WA 98382

Phone Number: 360-683-7205

### Life Income Plans

A life income gift offers a way to make a gift to NDLSA that provides you with benefits such as immediate income tax deduction, life income, and avoidance of capital gains tax. Some common forms of life income gifts include charitable remainder trusts and charitable gift annuities. We will be happy to consult with you on these.

### Retirement Plan Assets

In many cases, donating some or all of the assets from your IRA, 401(k), pension or other qualified retirement plan to NDLSA is a smart option. Your estate can save both income taxes and estate taxes if you make NDLSA a beneficiary. Gifts can be made during your lifetime or upon death.

### Other Planned Gift Options

NDLSA welcomes contributions of a variety of types of assets such as life insurance, U.S. savings bonds, annuity contracts, and tangible personal property.

For more information about crafting a gift of significance to NDLSA, call 360-683-6638.