

What is a Planned Gift?

A planned gift is one that is arranged in the present and allocated at a future date. Anyone can make a planned gift to The Children's Museum of Indianapolis! A planned gift, as part of an overall estate plan, takes your needs as well as the needs of your loved ones into consideration, while helping support the mission of The Children's Museum.

How does a Planned Gift benefit me?

Planned gifts provide creative and flexible strategies for your estate and charitable planning, including additional income and reduced taxes. A planned gift may enable you to make a more significant donation than you thought possible. It can create opportunities to support the museum in a very impactful way.

How does a Planned Gift benefit my loved ones?

A planned gift can create potential savings on capital gains taxes or estate taxes, lessening the financial burden on your family and loved ones.

How does a Planned Gift benefit The Children's Museum?

Your planned gift, no matter the size, will support the Museum's endowment fund. The principle of the fund is invested and earnings from the endowment support extraordinary learning experiences across the arts, sciences and humanities . . . for generations to come.

Leave a Legacy. Make a Difference.

Planned gifts allow you to provide a secure future—for yourself, your loved ones, and for children and families who will visit The Children's Museum for generations to come. Choosing the right planned gift depends on your personal circumstances and your financial goals. Your planned gift to The Children's Museum will transform your generosity into extraordinary learning experiences for generations of families. Leave a legacy that will run deep and wide in the decades ahead.

Ruth Allison Lilly SOCIETY

LEAVE A LEGACY. MAKE A DIFFERENCE.

During her lifetime, Ruth Allison Lilly (1871–1973) was among the visionaries who helped establish The Children's Museum of Indianapolis as a world-class educational and cultural institution.

Membership in the Ruth Allison Lilly Society is reserved for donors who name The Children's Museum of Indianapolis in their estate plans or as a beneficiary designee. Notifying the Museum of your plans allows us to discuss your wishes for your gift and thank you during your lifetime. Members may remain anonymous. Include The Children's Museum of Indianapolis in your estate plans and become a part of our Legacy Society today.

We are happy to discuss the details and benefits of Planned Gifts with you and your financial advisor. For more information:

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Ruth Allison Lilly SOCIETY

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Extraordinary Gifts for an Extraordinary Future.





The following planned gift options will help you tailor your gift to meet your unique needs and goals for the future.

Beneficiary Designation

A simple way to include the Museum in your estate plan is to name The Children's Museum of Indianapolis as a beneficiary. Doing so is as simple as filling out a beneficiary designation form from your plan provider or administrator.

Retirement Plans: You can name the Museum as a beneficiary of your qualified retirement plan to receive a designated amount or percentage of assets you wish to be used for charitable purposes.

Life Insurance: Name the Museum as beneficiary of a policy you own.

Other forms of beneficiary designations include: Appreciated Securities/Investments Fund Accounts, United States Savings Bonds, Bank Accounts, Jointly Held Accounts and CD's.

Gifts from Your IRA

If you are 59½ years of age, you may make withdrawals (no early withdrawal penalty) to fund your charitable gifts. If you are at least 70½ years old, you may direct funds to be used to make a charitable gift on a tax-free basis.

Gift Life Insurance

Purchase a new policy or gift a paid-up policy or one on which you are currently paying premiums to The Children's Museum.

Bequest in Your Will

Through your will you can give:

- A specific sum of money or specific property.
- A percentage of your total estate.
- All or a percentage of the remainder after all other bequests are satisfied.

If you have already created your will, you can create a simple change, called a codicil, to add the Museum as your beneficiary.



Life-Income Gifts

With life income gifts, the Museum invests the proceeds of your donated assets—whether in the form of cash, securities, or other appreciated property—and pays you, or designated beneficiaries, an income for life or for a specified term of years. Examples include:

Charitable Remainder Trust

A charitable remainder trust lets you convert an appreciated asset like stock or real estate into an irrevocable trust, which pays you and/or another beneficiary a lifetime income and lowers your taxes, all while supporting The Children's Museum.

Charitable Gift Annuity

A charitable gift annuity allows you to support The Children's Museum while providing yourself and/or a spouse or other designated individual with a fixed income and the flexibility to decide when to start receiving payments.

Charitable Lead Trust

A charitable lead trust allows you to pass assets to your heirs with reduced or no estate taxes, along with providing fixed annual payments to The Children's Museum.