



CHARITABLE GIFT PLANNING

There are a number of ways you can make a planned gift to the California Science Center Foundation. The sample language provided in this document illustrates how a bequest or a gift through a living trust, qualified retirement plan, life insurance policy or charitable trust can be accomplished, and is intended to be used for educational purposes. This document is not intended to be, and should not be construed as, legal or tax advice. California Science Center Foundation does not provide legal or tax advice. We encourage donors to share this information with their financial and legal counsel and tax advisor, and recommend that anyone undertaking estate planning do so with the consultation of an attorney.

Cash Bequest

A cash bequest provides the California Science Center Foundation with a specified sum of money from a donor's estate. These bequests are fulfilled after specific and before residuary bequests.

"I give _____ Dollars (\$_____) or (____%) to the California Science Center Foundation, a California non-profit corporation TIN 95-2210527, 700 Exposition Park Drive, Los Angeles, CA 90037 to support its educational exhibits, programs and operations."

Residuary Bequest

A residuary bequest is made from the residue, or what remains in a donor's estate after specific and cash bequests, taxes, settlement costs and debts are satisfied. This type of bequest is sensitive to changes in the size of the estate over time.

"I give the residue (or _____ % of the residue) of my estate to the California Science Center Foundation, a California non-profit corporation TIN 95-2210527, 700 Exposition Park Drive, Los Angeles, CA 90037, to support its educational exhibits, programs and operations."

Beneficiary of a Qualified Retirement Plan, or Life Insurance

Naming the California Science Center Foundation as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan can accomplish a charitable goal while realizing tax savings. By naming the California Science Center Foundation as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support the California Science Center Foundation free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy. Simply request a change-of-beneficiary form from your plan administrator. When you have finished, please return the form to your plan administrator and notify the California Science Center Foundation. In community property states, such as California, additional documentation may be necessary if a surviving spouse is not the beneficiary.

Gift Planning at the California Science Center Foundation
213.744.2529 legacy@cscmail.org TIN 95-2210527

Include in your beneficiary form from your plan administrator:

"California Science Center Foundation, TIN 95-2210527

___% of distribution"

To name the California Science Center Foundation as a beneficiary of your annual IRA required minimum distribution (RMD) contact your plan administrator and include the following in the form:

"California Science Center Foundation, TIN 95-2210527, 700 Exposition Park Drive, Los Angeles, CA 90037."

You may wish to discuss with your attorney any advisable coordination between beneficiary designations and your Will or Revocable Living Trust.

We would be happy to work with you and your attorney to help you identify ways to give that will ensure your charitable objectives can be met while furthering the mission of the California Science Center Foundation.

For specific endowment language, please call the California Science Center Foundation at 213.744.2529.

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