



CALL TO ACTION:

YES! I want to learn more about leaving a legacy with an estate or planned gift to benefit students and teachers.

- I'd like to learn more about how I can leave a legacy that benefits students through AEF.
- I have included AEF in my estate plans and would like to share my plan with AEF.

Name: _____

Address: _____

Email: _____

Phone Number: _____

- I/We would like to be publicly recognized for my/our gift as:

- I/We prefer my/our gift to remain anonymous

Type of gift I/we are considering or have made:

- Bequest in my will/trust
- Beneficiary of a life insurance policy or financial account
- Other (please specify) _____

AEF'S COMMITMENT TO YOU

The Alexandria Education Foundation adheres to the highest standards in ethical fundraising and nonprofit management through the Associated of Fundraising Professionals Donor Bill of Rights. AEF will not sell or share your information. AEF will respect your privacy as a donor. For more information go to alexeducationfoundation.org or contact Kelli Minnerath at kminnerath@alexschools.org.



Alexandria Education Foundation
P.O. Box 308
Alexandria, MN 56308
320.762.3356

LEAVING YOUR LEGACY



Your gift will fund initiatives that ignite passion, unlock potential, and foster engagement for all learners and staff within Alexandria Public Schools.



YOU HAVE MANY WAYS TO LEAVE A LEGACY

Legacy gifts help you meet your philanthropic goals and extend your generosity well into the future. By including a gift to the Alexandria Education Foundation in your financial planning, you can continue creating opportunities for our students while advancing your personal and financial goals. In addition, these gifts can provide you and your family with tax and income benefits. Below are just a few ways you can meet your own financial goals and leave an educational legacy for generations of students to come.

LEAVE A BEQUEST IN YOUR WILL

A will or trust is often a reflection of what is most important in a person’s life. A bequest specified in your will/trust can create opportunities for students without changing the way you live your life today. The official bequest language for the Alexandria Education Foundation is:

I hereby give, devise and bequeath to the Alexandria Education Foundation, EIN 84-2833851. ___ percent of my estate (or the sum of \$___; or ___ percent of the residue of my estate), to be used by this organization for its tax-exempt purposes (or to be used for whatever purposes the donor directs - *an unrestricted designation giving the organization the greatest latitude*).

If you plan to make a charitable gift by including AEF in your will/trust, please meet with your attorney to discuss and update your will or trust. Please also work with AEF staff to ensure that we will be able to use your gift as intended.



GIVE THROUGH LIFE INSURANCE

You could create more and better opportunities for kids with a gift of life insurance. Some of the most satisfying uses for life insurance policies are connected to charitable gifts that support your values. Gifts of life insurance allow you to make a significant contribution without affecting the way you live today. Whether it’s a life insurance policy you no longer need or a new policy you decide to purchase, naming AEF as the beneficiary could help meet your charitable goals. The versatility of life insurance makes revisiting its use a good idea.

MAKE A GIFT NOW FROM YOUR IRA

VIA QUALIFIED CHARITABLE DISTRIBUTIONS

The IRS allows IRA owners age 70 1/2 or over to give up to \$100,000 directly from their IRA to one or more qualified charities annually without paying federal income tax on such distributions. Only traditional IRAs are eligible but owners of other types of qualified plans may roll assets into a new IRA to allow them to make gifts if such a rollover is otherwise permitted. Donors should consult with their tax advisor before doing so. You can request a charitable rollover withdrawal form through the bank or company where your assets are held.

PLEASE LET US KNOW YOUR PLANS

It would be wonderful to know if you have included AEF in your will or as a beneficiary in your life insurance policy. This would provide AEF the opportunity to thank you for your generosity. If you prefer to remain anonymous, your gift will be kept completely confidential. At the same time though, recognition of your gift may inspire others to do the same. Whatever your preference, AEF will honor your wishes.

NEXT STEPS

1. Contact Kelli Minnerath, Executive Director at 320-762-3356 or at kminnerath@alexschools.org for additional information or to chat about your options for including AEF in your will or estate plan.
2. Seek the advice of your financial, legal, or tax advisor.
3. If you include AEF in your plans, please use our legal name, address, and federal tax ID
Legal Name:
Alexandria Education Foundation
Legal Address:
PO Box 308 Alexandria, MN 56308
Federal Tax ID: 84-2833851

There are many other ways to leave a legacy for our students including gifts of stock and appreciated assets, real estate and other personal property. The information here is not intended as legal or tax advice. For information on how any gift may affect your tax situation, please consult with your own professional advisor. If you would like to know more about how your legacy gift could benefit Alexandria students and teachers for generations to come, please contact Kelli Minnerath, Executive Director of AEF at kminnerath@alexschools.org or at 320-762-3356.