

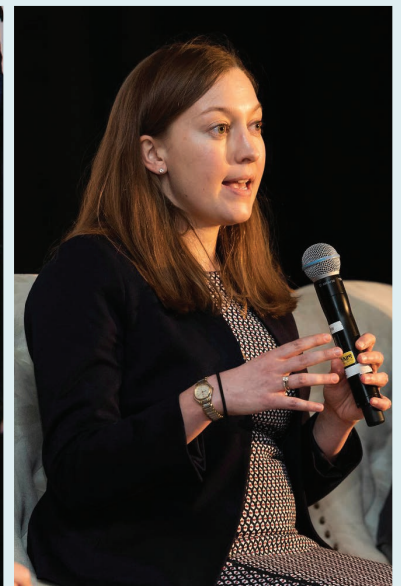


MERCATUS CENTER  
George Mason University



# LEAVING A LEGACY

MAKING A TRANSFORMATIONAL  
IMPACT THROUGH PLANNED GIVING





BETSY, JACOB, AND HARRIET ROTHSCHILD

DEAR MERCATUS CENTER SUPPORTER:

Thank you for partnering with us to improve the world. As a 100% privately funded organization, we truly could not advance our mission without you.

Much of the work we are doing will have the greatest impact on the next generation. I look at my three children and know I want them to inherit the freedom and opportunity to pursue their own happiness.

Making a planned gift is one of the simplest—yet most powerful—ways to contribute to the causes most important to you.

Included in this brochure are stories of Mercatus partners who, like you, believe the key to protecting our country's future lies in educating tomorrow's leaders, sharing free market ideas widely, and working effectively with policymakers. A legacy gift can help you make a tremendous, lasting investment in these efforts for generations to come.

I hope you will read their stories and be inspired to leave your legacy with Mercatus.

Sincerely,  
  
Daniel M. Rothschild  
EXECUTIVE DIRECTOR

## CHARITABLE GIFT ANNUITY

A charitable gift annuity allows you to transfer cash, stocks, or other assets to Mercatus, and in exchange receive fixed payments for life. Payment rates are based on your age, and can be paid out to you or someone you designate.

One of our dedicated supporters from the Midwest has been giving to Mercatus since 2002. Twelve years into our partnership, she was looking to make a larger gift while enjoying some immediate financial benefits. Ideally, she wanted to make a significant gift and live to see its impact—without compromising any other financial goals.

She worked with our team to set up a charitable gift annuity (CGA).

“I had the money at the time and invested in Mercatus, and now you are paying me!” she says. “When I pass, Mercatus gets the money, but for now I am invested. I love the charitable gift annuity!”

A CGA is a perfect gift for someone with goals like this donor's. Income security and tax benefits are two of the primary draws of a CGA; depending on one's age, the payments can actually be quite high. CGAs are one of the most common planned gifts for Mercatus donors.

# HOW TO ADVANCE FREEDOM FOR YEARS TO COME

## 1 BEQUEST IN A WILL

*One of the most straightforward ways to make a legacy gift is to include Mercatus in your will. You can gift a specific dollar amount or asset, a percentage of your estate, or the balance or residue of your estate. Or, you can make a beneficiary designation of certain assets.*

Kyle resides in Texas with his wife, Barbara. After enjoying a long career in the energy industry, being strategic with his charitable giving became increasingly important to him.

He expresses a view many Mercatus donors share: “I can’t stand politics, but I can’t ignore it either. When it comes to philanthropy, I focus my energy on policy, ideas, and getting people to think.”

Kyle and Barbara decided to include Mercatus as part of their estate plan in order to support student fellowships and policy research scholars.

“I like how Mercatus is training future decision makers,” says Kyle. “I want my money left in the hands of people who are going to change the world.”

**“If you are really trying to reduce poverty, help human flourishing . . . the best way to do that is to have institutions that support free markets.”**

*—Steve, Mercatus supporter*

## 2 BENEFICIARY OF A TRUST

*Establishing a trust and designating Mercatus as a beneficiary is an effective way to ensure your legacy giving is carried out according to your wishes.*

Steve, a successful entrepreneur in the financial services industry, knows firsthand that regulations, taxes, and other government-created obstacles stifle innovation and prevent products and services from entering the market.

He and his wife, Lana, are passionate about and focus their philanthropy on organizations that educate others about the power of free markets and limited government.

According to Steve, “Many people give money to various good causes, but it seems to me if you are really trying to reduce poverty, help human flourishing, improve people’s health, all of those things, that the best way to do that is to have institutions that support free markets, personal liberty, property rights—and the rest will pretty much take care of itself.”

The couple set up a foundation so that their estate will be managed by trustees who understand their desire to continue supporting organizations, such as Mercatus, that champion the public policies they believe in.

**OPTIONS TO CONSIDER:** There is a legacy gift option for every lifestyle and preference. Here are a few to consider: simple bequest language in a will • beneficiary of a trust • real estate • charitable gift annuity • IRA rollover • gifts of stocks and bonds • beneficiary designation gifts (i.e., a retirement, investment, or bank account or an insurance policy)



*Donating appreciated real estate to Mercatus—either by directly transferring ownership or making the gift via a trust—is a significant gift that can provide helpful tax benefits.*

“Although I was an entrepreneur for a little while and made some money at it, I’m certainly not a wealthy philanthropist,” says Roger. He and his wife, Judy, have supported Mercatus since 2006. They live in Arizona and have a daughter, two granddaughters, and one great-grandson.

Roger and Judy wanted to make a special gift that wouldn’t be possible in any single year. They decided to give a gift of real estate via a charitable remainder trust.

“Everyone’s financial situation is different,” says Roger. “For those people who are fortunate enough to have assets sufficient so that they can give quite generously while they’re still alive—they are going to be in a different situation. For someone like myself and my wife, who do still have a budget, something like a charitable remainder trust is a better way to go.”

Planning a gift of real estate allowed Roger and Judy to make a tremendous contribution that fit their lifestyle perfectly.



STEVE AND LANA (TOP, LEFT); ROGER AND JUDY (TOP, RIGHT);  
KYLE AND BARBARA (BOTTOM)



## LEAVE YOUR LEGACY

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[MERCATUS.ORG/LEGACY](http://MERCATUS.ORG/LEGACY)

# PLANNING YOUR BEQUEST

If you are interested in a bequest gift, here is some suggested language to discuss with your financial advisor:

"I hereby give, devise, and bequeath \_\_\_\_\_ and  $\frac{\text{No}}{100}$  dollars (\$DOLLARS) determined as of the date of my death, to the Mercatus Center, Inc. at George Mason University, a nonprofit organization located at 3434 Washington Blvd., 4th Floor, Arlington, VA 22201, Federal Tax ID #54-1436224, for the Mercatus Center's general use and purpose."

*\*To bequest a percentage of your estate, consider using "**X% of my total estate**" instead of the dollar amount.*

