

# Greenway Legacy Society



The Greenway Legacy Society recognizes those who help secure the Rose Kennedy Greenway Conservancy's strong, successful future beyond their lifetime by making a bequest or other planned gift. Members enjoy benefits and recognition now for their future gift, including invitations to Greenway Legacy Society events, Greenway tours upon request, and acknowledgment in the Conservancy's annual report and other publications.

By making a bequest to the Greenway Conservancy in your will or trust, or by designating the Conservancy as a beneficiary of your retirement account or insurance policy, you can ensure that the Conservancy will continue to provide vibrant, green space for all who share our city. The Conservancy welcomes estate gifts of any size, and there may be tax advantages associated with your gift.

## **MAKE A GIFT WITH A BEQUEST**

One of the simplest ways to remember the Greenway Conservancy in your estate plans is through your will or trust. You can designate a specific asset, amount of money, or percentage of your estate to the Greenway Conservancy using language such as:

*I give [the sum of \$\_\_\_\_\_] [an amount equal to \_\_\_\_% of the residue of my estate/of the trust property] [description of specific asset] to the Rose Fitzgerald Kennedy Greenway Conservancy, Inc., 185 Kneeland Street, Boston, Massachusetts, for its general charitable purposes.*

If making a non-cash gift of a specific asset (other than a publicly traded security), we encourage you to contact the Development Office to confirm the asset is eligible under the Conservancy's gift acceptance policy.

## **MAKE A GIFT WITH YOUR RETIREMENT PLAN**

Designating all or part of what remains of your retirement plan after your death can be a tax-efficient way to make a gift to the Greenway Conservancy. Since IRAs and 401(k) plans are usually funded with untaxed dollars, such plans are subject to income tax as well as estate tax. As a nonprofit organization, the Greenway Conservancy would receive your gift tax-free.

Making a gift from your IRA or 401(k) can be as simple as logging into your plan's website and designating the Greenway Conservancy as a beneficiary in the Beneficiary Designation area. You can also request a form from your plan administrator and name the Rose Fitzgerald Kennedy Greenway Conservancy as a beneficiary.

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## **MAKE A GIFT WITH YOUR LIFE INSURANCE POLICY**

If you own a life insurance policy that you no longer need, you can make the Greenway Conservancy the policy owner. By doing so, you will normally receive an income tax deduction for the policy's fair market value or cost basis. If you name the Greenway Conservancy beneficiary of the policy and retain ownership, you will receive an estate tax deduction for the insurance proceeds.

You will need the Greenway Conservancy's legal designation to finalize your planned gift:

**Rose Fitzgerald Kennedy Greenway Conservancy, Inc.**  
**185 Kneeland Street**  
**Boston, MA 02111**

Tax exempt under IRC Section 501c(3) and a public charity for federal tax purposes.  
**TIN# 20-1678932**

You may wish to print and mail our Greenway Legacy Society form to let us know of your planned gift intentions. For more information about the Greenway Legacy Society, please contact:

**David Dalena**  
**Senior Development Officer**  
**Rose Kennedy Greenway Conservancy**  
**185 Kneeland Street**  
**Boston, MA 02111**

Tel: 617.603.7754

Email: [ddalena@rosekennedygreenway.org](mailto:ddalena@rosekennedygreenway.org)

*This information is not intended as legal or financial advice. The Greenway Conservancy strongly encourages you to discuss any planned giving option with your attorney and/or financial advisor to ensure that it meets your financial and philanthropic objectives.*