

Planned Giving Information Packet

Overview

A planned gift through your estate to the French Library (the “FL”) enables you to leave a legacy of continued support that will help to assure the future success of the FL and its mission. In addition, planned gifts may provide financial/tax benefits for you and your family.

An estate gift to the FL may be structured in a variety of ways, including as a gift of a specific dollar amount or of a particular asset. Alternatively, you might wish to leave the FL a certain percentage of the remainder of your estate, after providing for family members and other beneficiaries. You also may stipulate whether your gift is for the general support of the FL or for a specific purpose. Your gift may be made in your name, or in honor or in memory of another individual.

Estate gifts to the French Library may include cash, securities, real estate, tangible personal property such as jewelry and works of art, or anything else of monetary value. You might consider making the FL the beneficiary of your life insurance policy, Individual Retirement Account and/or other accounts that permit you to name a beneficiary.

For examples of various types of estate gifts, please see page 2.

Katharine Lane Weems Society

When you inform us that you have made a planned gift to the French Library, you become a member of the Katharine Lane Weems Society. The society is named for the noted Boston sculptor who set the precedent for planned giving to the FL by bequeathing her home at 53 Marlborough Street to serve as our headquarters. Donors in this society are recognized every year in the FL’s annual report.

How to Notify Us of Your Planned Gift

Once you include the French Library in your estate plan, please notify us by completing and returning the planned gift intention form on pages 3-4.

Tax Identification Number

When you establish your gift, your estate planning advisor might ask for the French Library’s Tax Identification number as a 501(c)(3) tax-exempt institution. That number is: 046-045-400.

Examples of Estate Gift Language:

Please note that the information below is general in nature and not intended to be included in your estate plan without the assistance of your attorney. When making or revising your will, trust or other estate planning document, you should obtain the advice of a lawyer. The following are examples for making various types of estate gifts:

Outright gift of specific property, personal property or percent of estate

“I give and devise (\$ or % of estate), without reduction for any tax occasioned by my death, to the French Library, a Massachusetts charitable corporation located at 53 Marlborough Street, Boston, MA 02116 (the “FL”), to be used or disposed of as the French Library in its sole discretion deems appropriate.”



Gift of real estate

“I give and devise all of my right, title and interest in and to the real estate located at (give address or otherwise describe property), to the French Library, a Massachusetts charitable corporation located at 53 Marlborough Street, Boston, MA 02116 (the “FL”), to be used or disposed of as the FL in its sole discretion deems appropriate.”

Gift of a share or residue of estate

“I give and bequeath (\$ or % of estate) of the remainder of my property, without reduction for any tax occasioned by my death, to the French Library, a Massachusetts charitable corporation located at 53 Marlborough Street, Boston, MA 02116 (the “FL”), to be used or disposed of as the FL in its sole discretion deems appropriate.”

Conditional gift

“If my husband (wife) does not survive me, I give and bequeath (\$ or % of residue), without reduction for any tax occasioned by my death, to the French Library, a Massachusetts charitable corporation located at 53 Marlborough Street, Boston, MA 02116 (the “FL”), to be used or disposed of as the FL in its sole discretion deems appropriate.”

Planned Gift Intention Form

Name(s):
Date(s) of birth (MM/DD/YYYY):
Street:
City/State/Zip:
Email(s):
Phone # (s):

Type of planned gift:

If the French Library is a contingent beneficiary, please indicate the associated conditions:

Estimated current value of planned gift: \$

Please use my planned gift to support:

General operations / area where needed most

Other*:

**We will be pleased to discuss your planned gift with you and your advisor(s) in order to ensure that we can honor your charitable wishes.*



My planned gift is in honor/memory of:

The French Library wishes to recognize you as a member of the Katharine Lane Weems Society in our annual report. By agreeing to have your name listed (along with other donors), you will help inspire more philanthropists to make planned gifts to the FL.

My/Our preferred name listing is:

Planned Gift Intention Form (Continued)

When you return this form, please enclose a copy of the relevant provision of your will, trust, or estate planning document. Mail them to:

French Library
Attn: Barbara Bouquegneau, ED
53 Marlborough Street
Boston, MA 02116

If I/we make any changes to the enclosed provision, I/we will notify the French Library of such changes.

Signature: Date:

Signature: Date:

Merci beaucoup for your support of the French Library.

Questions? Please contact:

Barbara Bouquegneau
Executive Director
617.912.0400