



THE JUNIOR LEAGUE OF THE CITY OF NEW YORK, INC.
130 EAST 80TH STREET NEW YORK, NY 10075
PHONE: 212 288-6220 | FAX: 212 734-9364

HOW TO MAKE A GIFT OF SECURITIES

Thank you for considering making a gift of securities to the New York Junior League (NYJL). The instructions for both electronic and certificate transfers are outlined below.

ELECTRONIC TRANSFERS

To transfer shares electronically to NYJL, please supply your broker with the following information:

Vanguard Institutional Advisory Services

DTC #: 0062

For the Benefit of: Junior League of The City of New York, Inc.

Brokerage Account #: 71359482

Tax ID: 13-1624066

CERTIFICATES

If the securities are in your name and your possession, please send unendorsed certificates and the signature guaranteed stock power form by registered, return receipt requested mail to:

Vanguard Institutional Advisory Services

PO Box 982903

El Paso, Texas 79998-2903

DTC #: 0062

For the Benefit of: Junior League of The City of New York, Inc.

Brokerage Account #: 71359482

Tax ID: 13-1624066

If your brokerage house has further questions, have them call 877-662-7447 and give them our account number **#71359482**; you can also call 800-669-0498 and reference our Sweep Account#88139578153

HOW TO MAKE A WITH A DAF or IRA RMD

Thank you for considering donating to NYJL using your DAF or QCD funds.

Donor Advised Funds (DAF): Individuals, families, companies, trusts, estates, private foundations and other nonprofits are all eligible to open a DAF and donate money to any qualified non-profit, like NYJL. The charitable dollars in your DAF can be invested before they are granted out. While you can take an immediate tax deduction for the gifts you make to your DAF, you will *not* be taxed on any growth, since the assets belong to the DAF's charitable sponsor.

All DAF contributions must be 100% tax deductible and are not eligible for membership, tickets or anything sponsorships.

Email development@nyjl.org to get NYJL bank information to contribute from your DAF.

A Qualified Charitable Distribution (QCD), also known as an “IRA Charitable Rollover Gift,” is a direct transfer of funds from an individual’s IRA account to a qualified charity (as described in the Internal Revenue Code). Anyone 70.5 years of age or older can give up to \$100,000 as a tax-free gift from their traditional IRA account as part of their Required Minimum Distribution (RMD)

Since these gifts come out of your IRAs without any income taxes, they are not deductible like other charitable contributions. The most common way to make a QCD is for donors to submit a request form to their IRA custodian, such as Fidelity, Vanguard, or Charles Schwab. The custodian then sends the money directly to the requested nonprofit.

For more information about QCDs and help finding the request form for your IRA custodian contact development@nyjl.org.

HOW TO MAKE A GIFT THROUGH YOUR IRA, 401(k), OR LIFE INSURANCE

Thank you for considering **making a legacy gift** to the New York Junior League (NYJL) through your **IRA, 401(k), or life insurance policy**. These gifts are simple, flexible, and impactful ways to support NYJL’s mission while ensuring tax-efficient benefits for you and your loved ones.

IRA & 401(k) Beneficiary Designation

One of the easiest ways to support NYJL is by naming us as a beneficiary of your **IRA or 401(k)**. Retirement plan assets left to heirs may be subject to income and estate taxes, but when directed to a nonprofit like NYJL, these assets pass tax-free, maximizing the impact of your gift.

How to Name NYJL as a Beneficiary of Your IRA or 401(k):

1. Request a Beneficiary Designation Form from your retirement plan administrator (Fidelity, Vanguard, Charles Schwab, etc.).
2. List NYJL as a primary or contingent beneficiary of your IRA or 401(k).
 - Legal Name: Junior League of The City of New York, Inc.
 - Tax ID: 13-1624066
 - Address: 130 E 80th St, New York, NY 10075
3. Return the completed form to your plan administrator and notify NYJL at development@nyjl.org to ensure your gift is properly recognized.

If you are 72 or older, you may also consider making a Qualified Charitable Distribution (QCD) to satisfy your Required Minimum Distribution (RMD). See the QCD section for more details.

Life Insurance Policy Gifts

A gift of life insurance is an excellent way to make a larger impact than you might have thought possible. By naming NYJL as a beneficiary, you can contribute a meaningful gift while retaining financial security for your loved ones.

How to Name NYJL as a Beneficiary of Your Life Insurance Policy:

1. Contact your life insurance provider and request a Beneficiary Designation Form.
 2. List NYJL as a full, partial, or contingent beneficiary of your policy.
 - Legal Name: Junior League of The City of New York, Inc.
 - Tax ID: 13-1624066
 - Address: 130 E 80th St, New York, NY 10075
 3. Return the completed form to your insurance provider and notify NYJL at development@nyjl.org so we can properly acknowledge your generosity.
- Alternatively, you can also transfer ownership of a fully paid policy to NYJL, allowing us to benefit from the policy proceeds while offering you potential tax benefits.

Questions?

We would love to help you explore the best way to structure your legacy gift. Please contact our Development Team at development@nyjl.org for more information.

HOW TO MAKE A GIFT THROUGH A CHARITABLE REMAINDER TRUST (CRT):

Thank you for considering a **Charitable Remainder Trust (CRT)** as a way to support the **New York Junior League (NYJL)** while providing income for yourself or your loved ones. A **CRT is a tax-efficient giving strategy** that allows you to make a significant impact on NYJL's mission while receiving financial benefits.

What is a Charitable Remainder Trust (CRT)?

A **Charitable Remainder Trust** is an **irrevocable trust** that provides you or designated beneficiaries with **income for life or a set period of time (up to 20 years)**. After the trust term ends, the remaining assets are donated to NYJL.

Benefits of a CRT:

- ✓ **Lifetime or fixed-term income** for you or beneficiaries
- ✓ **Significant tax benefits**, including an immediate charitable deduction
- ✓ **Avoidance of capital gains taxes** on donated appreciated assets
- ✓ **Potential estate tax reductions**
- ✓ **A lasting legacy** in support of NYJL's mission

How to Establish a Charitable Remainder Trust for NYJL

1. **Work with Your Financial or Legal Advisor.** Consult with your estate planning attorney or financial advisor to determine the best CRT structure for your needs (Charitable Remainder Unitrust (CRUT) vs. Charitable Remainder Annuity Trust (CRAT)).
2. **Fund the Trust.** Contribute assets such as **cash, appreciated stocks, real estate, or other highly appreciated assets** to the trust.
3. **Designate Income Beneficiaries.** You can receive income from the trust for life, or designate another beneficiary (such as a spouse or family member).
4. **Name NYJL as the Remainder Beneficiary**
 - Upon termination of the trust, the remaining assets will be transferred to **The New York Junior League** to support our programs and mission.
 - **Legal Name:** Junior League of The City of New York, Inc.
 - **Tax ID:** 13-1624066
 - **Address:** 130 E 80th St, New York, NY 10075
3. **Finalize & Execute the Trust Agreement.** Your attorney will draft the trust agreement, and you will sign and execute it with your trustee.
6. **Notify NYJL of Your Gift.** Inform us of your CRT by emailing development@nyjl.org so we can recognize your generosity and welcome you to the Mary Harriman Society.

Next Steps & Contact Information

If you are considering a **Charitable Remainder Trust**, we encourage you to consult with your financial or legal advisor to discuss your options. Our Development Team is also available to assist with any questions:

Contact: development@nyjl.org

Phone: 212 288-6220

Thank you for your commitment to NYJL's mission and for creating a lasting legacy through planned giving!

Thank you, we are grateful for your support to NYJL!