

## Join the Angelfish Society

### Create a lasting legacy with charitable gift planning.

Become a member of our Angelfish Society by making the North Carolina Aquarium Society part of your future gift plans. By letting The Society know your intentions we can recognize you for your generosity, vision and dedication to our Living Treasures. In every instance our top priority is to meet your needs and wishes.

### Planned Gifts Allow You To:

- Take care of the financial needs of your family first.
- Make a larger charitable gift than you thought possible.
- Reduce your income tax and even avoid capital gains taxes.
- Increase income and effective rate of return.
- Leave a legacy without giving up assets.
- Receive permanent recognition for your gift at all Aquarium locations.

### Designate Where and How Your Planned Gift is Used:

- The Aquarium Society's Living Treasures Fund will meet the greatest needs.
- Or, you may select your favorite Aquarium or Jennette's Pier to be the recipient.
- Make a splash by sponsoring a new exhibit.
- Support conservation or education programs.

### Choosing the Gift That's Right For You.

Start with your attorney and financial advisor (If you desire, we can put you in touch with a knowledgeable legal professional that can help you develop your plan). Let them know you are considering a planned gift to the North Carolina Aquarium Society. Ask them to help you determine the type of gift that best suits your personal and financial circumstances.

## How to Get Started

It's easy to review options and designate the NC Aquarium Society as a recipient of your planned gift. Simply contact Jay Barnes, Living Treasures

Campaign Director, to speak confidentially about your desires to support the Aquariums. Or, e-mail us at [development@ncaquariums.com](mailto:development@ncaquariums.com)

Jim Mulvey – (919) 877-5500 ext. 231  
or [jim.mulvey@ncaquariums.com](mailto:jim.mulvey@ncaquariums.com)

*If you have already named the  
North Carolina Aquarium Society in  
your estate plans, please let us know.*



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**PLANNED  
GIVING**



**Leave a Lasting Legacy by  
Supporting Our**

**LIVING  
TREASURES**

## You Can Make a Difference by Joining the Angelfish Society

YOUR GOAL	Make a gift that costs nothing during your lifetime but leaves a legacy.	Avoid tax on capital gains or make a larger gift than possible with cash.	Make a gift from unused retirement funds. (Your heirs will avoid income taxes.)	Make a future gift with current income tax deduction at no cost to you.	Create a fixed income stream and avoid or defer capital gains taxes.	Create a variable income stream and avoid or defer capital gains taxes.	Reduce gift and estate taxes on assets you pass to your children or grandchildren.	Make a gift now and retain use of your residence or property.
YOUR GIFT	BEQUEST	APPRECIATED SECURITIES	RETIREMENT PLAN ASSETS OR IRAs	LIFE INSURANCE	CHARITABLE GIFT ANNUITY	CHARITABLE REMAINDER TRUST	CHARITABLE LEAD TRUST	CHARITABLE LIFE ESTATE
HOW YOU MAKE THE GIFT	Name the North Carolina Aquarium Society in your will.  Options: Percentage of Estate, Specific Dollar Amount, Specific Property, Residue of Estate	Contribute appreciated stock or other marketable securities that you have owned for at least one year.	Name the North Carolina Aquarium Society as successor beneficiary of your plan or IRA.	Donate a paid-up or new life insurance policy naming the North Carolina Aquarium Society as beneficiary and owner. Several options available.	A charitable gift annuity contract provides set income for life and names the North Carolina Aquarium Society as successor beneficiary.	Give the remainder of a trust to the North Carolina Aquarium Society.	Create a charitable trust that pays income to the North Carolina Aquarium Society for a specific term of years with the principal retained for your heirs.	You deed the property to the North Carolina Aquarium Society. The Charitable Life Estate allows contributions of a residence, farm or property while retaining lifetime use. (You remain responsible for current use maintenance, taxes and insurance).
YOUR BENEFITS	You control the assets during your lifetime and your donation is exempt from federal estate taxes.	Current income tax deduction for full market value. Avoid capital gains tax.	Donation exempt from federal estate and income taxes. You can continue withdrawals from the plan during your lifetime. Allows you to make your gift from the most highly taxed assets, leaving more tax-advantage assets to your heirs.	Current income tax deduction for paid-up policy; deduction for premium payments on new policy. Donation exempt from federal estate tax.	Fixed payments for life. Current income tax deduction for a portion of the annuity amount; annual payments are partially tax-free.	Charitable trust pays variable income for life or a term of years. Current income tax deduction for a portion of the assets placed in the trust. Remove taxable assets from your estate.	See the benefit of your gift now and a current tax deduction. Trust assets return to you or your heirs.	Current income tax deduction based on life expectancy or years. Avoid capital gains tax. Removes taxable assets from your estate.

The purpose of this brochure is to provide general information. It is not intended as legal, accounting, tax or other professional advice and should not be relied upon as such. For assistance with your particular situation, please consult an attorney, tax advisor, financial advisor or other professional.