



A Gift in Your Will – Plan Now, Give Later

Bequest – Keep your assets and give later through your will or trust to provide for the future.

One of the easiest ways to make a planned gift is to simply name Meher Mount Corporation as a beneficiary in your will and/or living trust.

A gift in your will or trust may be for a percentage of your estate *or* particular dollar amount. Estate tax savings may be significant.

Making a gift in your will gives you the immediate satisfaction of creating a lasting and personal legacy that ensures Meher Mount's future and will cost you nothing now.

Benefits

- Your gift will have a significant impact
- A bequest is flexible
- You can use a wide range of assets to make your gift and create a highly personalized plan
- Your assets remain in your control during your lifetime
- You can modify your gift if your situation changes
- A charitable bequest may minimize estate tax

How It Works

For many donors, the easiest way to make a significant gift to Meher Mount through their will or living trust is to:

- Simply name Meher Mount as a beneficiary in your estate documents and direct your gift to Agnes Baron Endowment for Meher Mount *or* the Meher Mount General Fund.

- Create an addition (codicil) to your existing will or an amendment to your revocable trust.
- Choose to give a percentage of your estate *or* a specific sum in support of Meher Mount.

How to Include Meher Mount in Your Will or Living Trust

The following language may be used when you create your will, trust, or add a codicil to your existing will:

“I give, devise and bequeath to Meher Mount Corporation, a tax-exempt, not-for-profit, 501(c)3 organization at 9902 Sulphur Mountain Road, Ojai, CA, 93023-9374, Federal Tax ID: 77-0236525

- _____ % of my estate;
- or, the sum of \$_____;
- or, the following securities, real estate or tangible property (please provide details include location of real estate) _____;
- or, _____ % of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid;
- or, _____ % of the remainder of my estate in the event that a beneficiary is no longer living.”

If you wish to direct the funds to the **Agnes Baron Endowment for Meher Mount**:

“The property comprising this gift shall be used for the Agnes Baron Endowment for Meher Mount. If the needs for this charitable purpose no longer exist at some future date, the Board of Directors is authorized to use these funds in the best interests of Meher Mount.”

“The assets comprised in this gift may, for investment purposes, be merged with the general investment assets of Meher Mount. This gift shall be entered into the books and recorded as the Agnes Baron Endowment for Meher Mount and shall always be so designated. The spendable income from, but not

the principal, shall be used to further the purposes of Meher Mount in such manner as directed by the Board of Directors.”

If you wish to direct the funds to the **Meher Mount General Fund**:

“The property comprising this gift shall be used for the Meher Mount General Fund. The assets comprised in this gift may, for investment purposes, be merged with the general investment assets of Meher Mount. This gift shall be entered into the books and recorded as the Meher Mount General Fund and shall always be so designated. The spendable income from and the principal shall be used to further the purposes of Meher Mount in such manner as directed by the Board of Directors.”

Consult Your Personal Advisors

The information provided above is **not** to be construed as tax or legal advice and could change as tax laws change. You are advised to consult with your legal advisor, tax advisor, or professional estate planner to determine which options are best suited to your individual situation.

Share Your Plans to Ensure Your Legacy

If you have already included Meher Mount in your plans (or you intend to), please let us know. Meher Mount can provide you and your advisor(s) with any needed information. We will make sure your gift is used exactly as you wish. And Meher Mount would also like to personally acknowledge your thoughtfulness and generosity.

Questions or Need More Information?

Conversations with Meher Mount’s planned giving team are always confidential and never imply an obligation. Robert Turnage, Treasurer for Meher Mount, will respond and provide the information you requested.

- Call: Robert Turnage, Treasurer: 916-837-3907
- Email: robert.turnage@sbcglobal.net