



THE AGNES BARON ENDOWMENT FOR MEHER MOUNT

A GIFT FOR THE NEXT 700 YEARS AND BEYOND



AVATAR MEHER BABA at Meher Mount in 1956. Seated beside Him is co-founder and lifetime caretaker Agnes Baron who promised to keep Meher Mount for Meher Baba through "hellfire and damnation."

**OPEN THE GATES AT MEHER MOUNT FOR THE NEXT 700
YEARS AND BEYOND**

You can open the gates at Meher Mount for the next 700 years to welcome visitors like you to experience Meher Baba's eternal Presence.

When you make a gift in your will to the Agnes Baron Endowment for Meher Mount, you will be protecting and preserving Meher Mount for the next 700 years and beyond.

Meher Baba explained that the Avatar – God in human form – is brought down to earth every 700 to 1,400 years to aid in the process of moving creation forward in its never-ending journey toward God consciousness.

With your gift, you will keep this beacon of Meher Baba's love shining into the world. And you will make sure Meher Mount welcomes a *future* visitor, someone like you, to feel Meher Baba's love.

YOUR PLANNED GIFT PROVIDES FOR THE FUTURE

When you make a planned or cash gift, you will provide stability and continuity for a place you love and want to see it into the future.

Your gift to the endowment will become part of the principle or corpus of the endowment.

Your gift will grow through prudent management and investment. And a percentage of the earnings from the investments can be used for Meher Mount's programs and needs.

“If you want me to take care of Meher Mount, I will keep it for you through hellfire and damnation!” Agnes Baron promised Avatar Meher Baba.

Now, it is your turn to take care of Meher Mount. With your legacy or planned gift you will provide ongoing financial stability and sustainability.

You will provide a source of income that Meher Mount can rely on for the next 700 years – and beyond. Your gift to the endowment will last long into the future and generate income to protect and preserve Meher Mount.

HOW TO MAKE A GIFT TO THE ENDOWMENT

To make a gift to the endowment, you just need to make a current or planned gift – of any size – to Meher Mount and designate it for the Agnes Baron Endowment for Meher Mount. There is *no minimum donation*.

Ask yourself:

- **Is it important for me to preserve Meher Mount for future generations?**

If the answer is yes:

- **Identify a resource that could be used for a gift** — retirement fund, life insurance, savings, investments, annuity, or property.
- **Determine your family needs, your tax objectives**, and any other concerns you have.
- **After taking care of your heirs and family**, determine what resources you want to share with Meher Mount.

Once you have taken steps to make a gift to the Agnes Baron Endowment to open the gates for future visitors like you — you will have...

- **Satisfaction** in knowing you made a wise decision.
- **Peace of mind** in taking care of your affairs and setting something aside for Meher Mount.
- **Joy** in knowing that you are preserving Meher Mount for generations to come.
- **Confidence** in knowing that your gift will be invested and grow to build a strong foundation for Meher Mount.

Estate planning – regardless of the size of your estate – is a gift to your heirs and family.

They will know your wishes and will be grateful that you made plans ahead of time. It also gives you peace of mind knowing that you have made important key decisions.

Please start now. Contact your tax or legal advisor to discuss your options. A professional, personal advisor can guide you in making the decisions that fit your desires and are the most financially savvy.

It's hard to imagine our lives without this special place of pilgrimage where our hearts are lifted and filled with Meher Baba's love. That's why your planned gift is so important.

EASY OPTIONS FOR A PLANNED GIFT

You are advised to consult your legal or tax advisor or professional estate planner to determine the most personally advantageous options for you.

Beneficiary Legal Name: Meher Mount Corporation
Designation: Agnes Baron Endowment for Meher Mount
Address: 9902 Sulphur Mountain Road, Ojai, CA 93023-9374
Telephone: 805-640-0000
Federal Tax ID: 77-0236525
Status: 501(c)3 non-profit, charitable organization

- **A Gift in Your Will.** One of the easiest ways to make a legacy or planned gift is to simply name Meher Mount as a beneficiary in your will or living trust. A bequest – a gift in your will or trust – can be for a percentage (most common) or a specific amount.

Here is sample language for your will:

I [name], of [city, state ZIP], bequeath [] percent of my estate (or the sum of \$[]) to Meher Mount Corporation, designated for the Agnes Baron Endowment for Meher Mount, a tax-exempt, nonprofit 501(c)3 organization at 9902 Sulphur Mountain Road, Ojai, CA 93023-9374. Federal Tax ID: 77-0236525.

- **Beneficiary Designation.** To make a planned gift – without adding to or changing your will – you can make a beneficiary designation. Retirement plans, life insurance policies, or annuities are all options. You can specify a percentage of the value, the entire amount, or a lesser amount.

To designate Meher Mount as a beneficiary, contact your plan administrator or insurance broker to obtain a beneficiary designation form. Here’s the information you need to know:

Beneficiary Legal Name: Meher Mount Corporation
Designation: Agnes Baron Endowment for Meher Mount
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- **Appreciated Securities.** Giving appreciated securities often allows you to make a bigger charitable impact than might otherwise be possible. For more information, go to: www.mehermount.org/plannedgift-securities.
- **Donor-Advised Funds.** You can make current and future gifts from a Donor-Advised Fund. For more information, go to: www.mehermount.org/donor-advised-fund
- **Qualified Charitable Distribution.** You can make a *future* gift from your IRA which may have tax benefits for your heirs.

And you can also lower taxable income *now*. If you are 70.5 or older, you can donate up to \$100,000 per year from your IRA. If you are subject to a Required Minimum Distribution (RMD), an IRA gift can help you meet your RMD while lowering your taxable income.

For more information on making a current or planned gift from your IRA, go to: www.mehermount.org/plannedgift-retirement-assets

YOUR GIFT IS THOUGHTFUL STEWARDSHIP

A gift to the Agnes Baron Endowment “is another pillar to sustain Meher Mount for future generations to experience this very special place,” noted one donor.

Through this endowment fund:

- You will maintain Meher Mount as a place for remembering Avatar Meher Baba, honoring His presence at Meher Mount, and sharing His life and message.
- You will preserve the natural environment to support loving God through nature.
- You will facilitate day pilgrimage of visitors while minimizing adverse impact to Meher Mount.
- And you will preserve Meher Mount for future generations with your thoughtful and careful stewardship.

Your gift to the Agnes Baron Endowment will generate funds to preserve and protect Meher Mount long into the future.

“We want others to experience Meher Mount the way we have experienced it,” shared another donor to the endowment.

CONSULT YOUR PERSONAL ADVISOR

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, accountant, or professional estate planner to determine which options are best suited to your individual situation.

QUESTIONS? NEED MORE INFORMATION?

During this process, you may want to contact Meher Mount for a confidential discussion to determine the best way to designate Meher Mount in your will or other document.

Any conversation is confidential and implies no obligation. To contact Meher Mount: Phone: 805-640-0000 or Email: info@mehermount.org

SHARE YOUR PLANS TO ENSURE YOUR LEGACY

Once you have discussed your options with your advisors and have decided to make a planned gift to Meher Mount, please share these plans. We can provide you and your advisors with sample language, if needed. And Meher Mount will make sure your gift is used exactly as you wish.

If you have already included Meher Mount in your plans or you intend to, please contact us. We would like to make sure your wishes are understood and that your gift will be used exactly as you intend.

Thank you for your thoughtfulness and generosity.



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Email: info@mehermount.org
Website: www.mehermount.org