

Planned giving society established

The Thomas Jefferson Foundation has established the Portico Society to recognize, honor, and thank the dedicated friends of Monticello who have remembered the Foundation in their estate plans.

Membership in the Portico Society is exclusive to those who have designated a deferred gift to benefit Monticello and who have informed the Foundation of this commitment.

Provisions include bequest intentions through an executed will or trust; gifts that provide a life income (such as charitable remainder trusts and charitable gift annuities); and gifts of real estate, life insurance, and retirement plan assets. Membership is also open to those who bequeath Jefferson-period objects to the Foundation for its collections.

“A number of our friends have told us of their intention to remember Monticello with future support. The Portico Society allows us to thank them for their generous intentions,” said Foundation President Daniel P. Jordan.

Donors who join the Portico Society before Dec. 31 of this year will be designated charter members and will be recognized by name in the new Thomas Jefferson Visitor Center, scheduled to open in late 2008. Requests for anonymity will be honored.

The Foundation has recently begun to offer charitable gift annuities as a planned giving option. A charitable gift annuity enables a donor to make

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CONTINUED, PAGE **TWO**

a gift to Monticello and still receive an income. It is formed by a contract under which the Thomas Jefferson Foundation agrees to make quarterly payments in return for a gift of cash or securities.

“We are pleased to be able to now offer charitable gift annuities to our supporters, as they are sometimes recommended by tax and investment advisers,” said Vice President for External Affairs Melissa A. Young.

Additional information about the Portico Society and planned giving options can be obtained by contacting Young at P.O. Box 217, Charlottesville VA 22092, myoung@monticello.org, or (434) 984-9824.

COMMENTS? newsletter@monticello.org