

**Thank you for your interest in including Connecticut Public in your estate plans.**

Three documents are included in this packet:

- Visionary Society Information
- Planned Giving Commitment Form
- Suggested Bequest Language

All donors who include Connecticut Public in their estate plans are included in our Visionary Society. This society recognizes the commitment and generosity of those who have remembered our organization in their will or estate plans. You can also choose to remain anonymous if you wish.

All planned gifts are added to Connecticut Public's Endowment Fund unless otherwise specified, making your contributions a truly legacy.

If you are thinking about making a charitable gift in your will or other plans, we would be pleased to share more information and discuss options that will best suit your individual needs. You are welcome to contact me at 860.275.7250 or email me at [lwrubleski@ctpublic.org](mailto:lwrubleski@ctpublic.org).

Connecticut Public is honored that you turned to us for such an important planning need. Because of special people like you, this station has been able serve our community for nearly 60 years. We look forward to serving you, your family, and your friends for many years to come.

Sincerely,



**Lisa Wrubleski**  
*Manager, Donor Relations and Estate Gift Planning*

CONNECTICUT PUBLIC  
VISIONARY SOCIETY



**OUR VISIONARY SOCIETY was created as a way to recognize and thank donors who have made provisions in their estate plans for a gift to Connecticut Public, recognizing that the gift may be postponed until after their lifetime. Visionary Society donors create a perpetual legacy for our organization, ensuring that public media will inform and enrich the lives of many generations to come.**

### Benefits

Donors who become members of this group can be certain the future of public media will profit from their foresight and generosity. Members' names are listed in various materials, unless they request that their intentions be kept confidential. From time to time, selected Visionary Society members will also be featured, with their permission, in planned giving articles in our publications.

Upon expressing their intentions, donors receive letters of acknowledgment and gratitude from our organization and specifically from our President and CEO, Mark Contreras.

### Membership

There are several ways by which donors become Visionary Society members. They include:

**Bequest** A provision of one's estate plan (will or living trust) that includes Connecticut Public as a beneficiary. Examples of this are:

- Specific bequest of money or property;
- Residual bequest of the remainder of the estate after specific bequests;
- Contingent bequest (gift occurs only if named beneficiaries die before the donor).

**Planned Gift** An irrevocable gift that provides a donor (and/or others) with a life income or other benefits and specifies Connecticut Public as the charitable beneficiary.

**Life Insurance** A donor may:

- Take out a policy naming Connecticut Public as the beneficiary (which is revocable);
- Take out a policy naming Connecticut Public as owner and beneficiary, (which is irrevocable); or
- Change the provisions of an existing policy, by naming Connecticut Public as the beneficiary of the policy or by transferring ownership of the policy to our organization.

**Qualified Retirement Plan** A tax-deferred retirement plan [IRA, 401(k), 403(b) etc.] is a great way to provide for retirement years, and reflects wise planning. However, as

## YOUR GIFT SUSTAINS THE UNIQUE PROMISE OF PUBLIC MEDIA

much as 80% of its remaining principal value can be taken in taxes upon death when a natural heir or other person is named as beneficiary. Persons who select Connecticut Public as the beneficiary can avoid all those taxes, and can leave other, lower-taxed assets to family members. Your plan administrator can provide the beneficiary designation forms needed.

### Authentication

When donors inform us they have included us in their estate plans, they are encouraged to fill out a commitment form (enclosed) and provide documentation of their intentions. Such documentation would include a copy of the will or living trust (or at least the portion pertaining to the Connecticut Public bequest) or, in the case of life insurance, retirement plan or life income plan, a copy of the beneficiary designation.

### Donor Information

Everyone has a life story. Donors are encouraged to share their story with us, by filling out and returning the enclosed donor testimonial form. This will be placed in their permanent file at Connecticut Public and will be made available to be used in marketing materials, serving as a reflection of your values and an inspirational message to those considering doing the same.

### Uses of the Gifts

Visionary Society members, like all donors to Connecticut Public, are free to designate the area(s) within our organization where their gift is to be used and applied. All planned gifts will be added to Connecticut Public's Endowment Fund unless otherwise specified.

**Visionary Society members are valued for their foresight, their loyalty and their deep spirit of caring about the future of public media. It is our hope that members feel a special sense of pride and accomplishment in being a part of this unique and visionary group.**

### For more information, contact:

Lisa Wrubleski  
*Manager, Donor Relations  
and Estate Gift Planning*

860.275.7250  
lwrubleski@ctpublic.org



CONNECTICUT PUBLIC  
VISIONARY SOCIETY



PLANNED GIVING COMMITMENT FORM

FEDERAL TAX ID #:06-0758938

**THE VISIONARY SOCIETY** program recognizes the commitment and generosity of those who have remembered Connecticut Public in their will or estate plans. Your gift will serve as a living legacy and ensure the future of excellence in public broadcasting.

This document will assist our planning and inform us of your recognition wishes. This is not a legal document. You may include as much, or as little information as you wish. Thank you.

**I/we have made provisions for Connecticut Public in my estate plans as follows:**

**Bequest in my will**

Specific amount \$\_\_\_\_\_

Percentage of my estate \_\_\_\_\_%

**IRA**

**Life Insurance**

**Trust**

**Other**

Estimated value of gift \$\_\_\_\_\_

Notes\_\_\_\_\_

I/we would like to be listed in any publication/ on-air recognition in connection with the Visionary Society program as:

\_\_\_\_\_

I/we wish to remain anonymous

Name\_\_\_\_\_

City\_\_\_\_\_ State\_\_\_\_\_ Zip\_\_\_\_\_

Telephone\_\_\_\_\_ Date\_\_\_\_\_

Signature\_\_\_\_\_

*If you are comfortable sharing your planning documents, please attach copies of your will, trust provisions or any designation forms naming Connecticut Public as a beneficiary for our records.*

**For more information, contact:**

Lisa Wrubleski  
Manager, Donor Relations  
and Estate Gift Planning

Connecticut Public  
1049 Asylum Avenue  
Hartford, CT 06105

860.275.7250  
lwrubleski@ctpublic.org





**When making or revising a will, you should obtain the assistance of an attorney.** The staff at Connecticut Public will be pleased to work with you and your professional advisor(s) to design an estate plan specifically tailored to your wishes. You are encouraged to make your gift to Connecticut Public, **Tax ID: 06-0758938.**

**The following are suggested forms for making your bequest:**

**Outright Bequest in Will**

I bequeath the sum of \$\_\_\_\_\_ (or legal description of property, percentage of estate, all/or percentage of the remainder of your estate) to Connecticut Public, 1049 Asylum Avenue, Hartford, CT 06105 for its general purposes (or for a designated purpose).

**Conditional Bequest in Will**

If (one or more individuals) does not survive me, I bequeath the sum of \$\_\_\_\_\_ to Connecticut Public, 1049 Asylum Avenue, Hartford, CT 06105, for its general purposes (or for a designated purpose).

**For more information, contact:**

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