

PROJECT SAGE

to end relationship violence



JANE DOE SOCIETY

PLANNED GIVING AT PROJECT SAGE

Planned giving options include:

Bequests

Gifts of retirement plans

Gifts of appreciated securities

Gifts of life insurance

Gifts of stock

Please contact your financial advisor to determine the right option for you. If you have questions about planned giving to Project SAGE, please contact us at 860-364-1080 or kaitlynr@project-sage.org.

RETIREMENT PLAN

You can name Project SAGE as a beneficiary of your IRA or other qualified retirement benefits. A tax advisor can provide information regarding the tax benefits of such gifts. Naming Project SAGE as the beneficiary of a qualified retirement plan asset such as a 401(K), 403(B), IRA Keogh or profit-sharing pension plan supports our mission while realizing significant tax savings. Simply request a change of beneficiary form from your plan administrator. When you are done, please return the form to your plan administrator and notify Project SAGE.



APPRECIATED SECURITIES

You may transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to Project SAGE. We will then sell your securities at the appropriate time and use the proceeds to support our programming.



BEQUESTS

SIMPLE & CONVENIENT.

THERE ARE SEVERAL OPTIONS AVAILABLE:

Option 1: Bequest of Specific Amount:

"I give, devise, and bequeath \$_____ to Project SAGE, Tax ID 06-1072379. Project SAGE may be contacted at:

13A Porter Street, #717, Lakeville, CT 06039.

Option 2: Bequest of Remainder of Estate:

"I give, devise, and bequeath to Project SAGE, Tax ID 06-1072379, all (or state the fraction or percentage) of the rest, residue, and remainder of my estate, both real and personal. Project SAGE may be contacted at:

13A Porter Street, #717, Lakeville, CT 06039.



LIFE INSURANCE POLICIES

Life insurance can be utilized to make a sizeable gift to Project SAGE, by listing our agency as a beneficiary of the policy.

STOCK TRANSFER

To make a gift of stock to Project SAGE, please complete and print the stock transfer form at: www.project-sage.org.

Project SAGE requests that you share basic information about your plans with us, so that we can lend any assistance and credit your gift when it arrives.

