



## **Planned Giving**

Thank you for your interest in making a planned gift to the Manhattan Institute. A planned gift is a commitment to the Manhattan Institute for Policy Research, Inc. that becomes effective at death or after a specified number of years. When you include the Institute in your will or other estate plans, you help strengthen our long-term ability to remain an important force in shaping U.S. public policy. Planned gifts to the Manhattan Institute include:

### **1) Bequests**

Bequests allow you to make a contribution without reducing current income. A bequest operates like a postdated check payable only after death. Charitable bequests can include cash, securities, real estate, or other property.

A bequest has several benefits:

- a) It is not payable until death, so it does not affect your assets or cash flow during your lifetime.
- b) It is private: your will is not filed or made public until your death.
- c) It is revocable: you may change the provisions in your will or trust at any time until death.
- d) It enables you to become a member of our Legacy Circle (see details below).

Please find below an example of language that could be used to prepare wills containing a specific bequest to the Manhattan Institute:

“I give, devise, and bequeath to the Manhattan Institute for Policy Research, Inc., a 501(c)(3) nonprofit organization having its principal office at 52 Vanderbilt Avenue, New York, NY 10017, \$\_\_\_\_\_, to be used for general purposes.”

Note that gifts can be designated more specifically. Please call the development department, at 212-599-7000, for more information.

### **2) Life Insurance**

Life insurance gifts are another way to make a financial contribution to the Manhattan Institute. After your lifetime and/or the lifetime of another designated beneficiary, the remaining balance is used to support the Institute. By giving a life insurance gift, you will:

- a) Get an income-tax charitable deduction in the year you make the gift.
- b) Reduce, or possibly eliminate, federal estate taxes.
- c) Avoid or reduce your capital-gains taxes if you fund your gift with an appreciated asset.
- d) Become a Legacy Circle member.

### **3) Retirement Plan Benefits**

Donors who wish to make a gift from a retirement plan may do so by contacting their plan administrator and designating the Manhattan Institute for Policy Research, Inc. as beneficiary.

## **Become Part of Our Legacy Circle**

A planned gift also makes you eligible for membership in the Manhattan Institute's **Legacy Circle**. The Legacy Circle honors individuals and families who have notified us of their intention to include the Institute in their estate plans. Legacy Circle members are invited to become part of the inner workings of the Manhattan Institute. This includes receiving updates on the ongoing work of MI and invitations to Legacy Circle members-only special events, as well as the opportunity to help the Institute in further developing our Planned Giving program.

Over the past thirty years, the Manhattan Institute has been the beneficiary of many gifts, large and small. Regardless of size, each gift has helped us promote our free-market, pro-growth message and has provided us with the means to disseminate our work to the masses. Through the benefits described above, we hope that you will gain satisfaction in knowing that your contributions have helped build a strong, long-lasting foundation for the Institute.

## **Getting Started**

If you would like to make a planned gift, please contact your attorney and provide him or her with the following information:

- 1) Legal Name:  
**Manhattan Institute for Policy Research, Inc.**
  
- 2) Legal Address:  
**52 Vanderbilt Avenue  
New York, NY 10017**
  
- 3) Employer Identification Number (EIN): **13-2912529**

If you would like to make a charitable gift through a retirement plan, your plan administrator will ask you to complete a Change of Beneficiary form. You will need the above information for this form.

Lastly, while you are under no obligation to let us know about your gift, the Institute would greatly appreciate if you would notify us of your intentions. This can be done by sending us a note expressing your plan to include the Institute in your will or an indication of the fact that you have already done so.

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The information on this site is not intended to be legal or tax advice. It is highly recommended that prospective donors consult with their own tax or legal advisors prior to making a planned gift.

If you have any questions or would like more information, please contact Vanessa Mendoza, Vice President of Development, by phone: 212-599-7000; e-mail: [support@manhattan-institute.org](mailto:support@manhattan-institute.org); or regular mail:

Manhattan Institute for Policy Research, Inc.  
c/o Vanessa Mendoza  
52 Vanderbilt Avenue, Floor 3  
New York, NY 10017

***The mission of the Manhattan Institute is to develop and disseminate new ideas that foster greater economic choice and individual responsibility.***