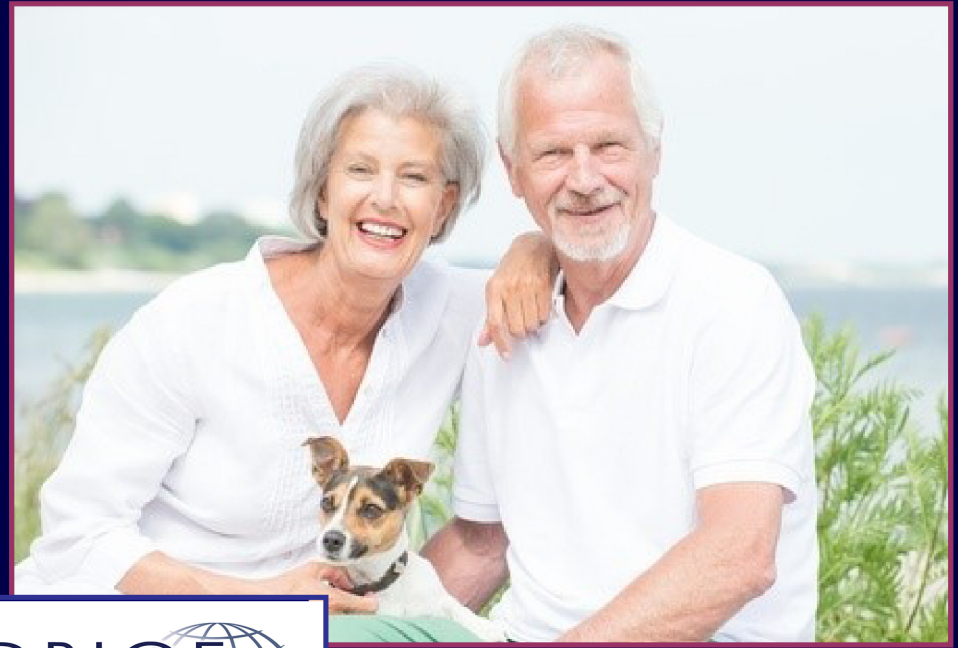


Your Legacy...America's Best Investment

Planned Giving to The Foundation for the Malcolm Baldrige National Quality Award, Inc.



Charitable Giving through Bequests, Annuities & Trusts

An investment in saving, transforming and enriching lives...

Areas of Impact: Baldrige changes lives through improved education for our children, better healthcare practices that heal patients, more efficient processes that allow companies to produce products for the consumer of higher quality and lower cost, and enhanced preparedness to prevent and respond to cybersecurity breaches.

How you can help: You can make an impact on America's future through your planned gift to the Baldrige Foundation. Through this option, you have the ability to make a charitable gift today or in the future, using wills, charitable trusts, annuities or bequests. Based on your personal tax, financial and planning needs, we will work with you to determine which type of gift would be best.

Do you want to support Baldrige but worry that you will not have enough income for yourself and your family? Life income gifts such as gift annuities and charitable trusts can provide you with an income stream, significant tax savings and the satisfaction of supporting the Baldrige Foundation in changing lives. If you are still raising your family, or just getting started in your career, naming The Baldrige Foundation in your will is a wonderful way to support our efforts and our mission for years to come.



What giving options do I have?

Bequest by Will: Naming the Baldrige Foundation as a beneficiary in your will is simple, can provide estate tax advantages, is revocable, can be for any amount you wish, and can name any assets including real property. You can honor a loved one by naming the bequest in honor or in memory of them.

IRA/Retirement: Naming the Foundation as the beneficiary of an IRA or a retirement plan can be an excellent way to reduce the tax impact on your estate and family members. Not only will the retirement plan escape taxation, but it will pass to the Foundation without reduction for income taxes, saving your beneficiaries from the possibility of income tax on your retirement savings. We would be delighted to speak with you about these and other options, including gift annuities.

Charitable Trusts: A transfer to a Lead Trust will provide the Foundation with an annual payment over a period of years. At the end of the term, the trust asset will pass to the donor or the donor's children. A Remainder Trust provides the donor with annual payments over a period of years. At the end of the term, the trust assets pass to the Foundation. Both types of trusts can offer the donor an income tax deduction for a future gift.

Annuity/Life Insurance: Life insurance makes it possible for anyone to make a meaningful gift. A donor can name the Foundation as the beneficiary of a policy, while retaining ownership of the policy, or the donor can donate the policy to the Foundation. Donors may receive an income tax deduction when they donate a policy.

| Planned Giving Gift Comparison | | | | |
|---|---------|---|-----------------------------------|--|
| | Bequest | IRA/Retirement | Charitable Trust | Annuity |
| Revocable | Yes | Yes | No | No |
| Minimum Gift Amount | None | None | Depends | \$10,000 |
| Assets that can be used | Any | Monies within IRA or retirement savings account | Any | Any |
| Tax Benefits | Estate | Estate and possible income tax benefits for non-charitable beneficiaries. | Dependent upon trust | Income and Estate |
| income stream to the donor? | No | No | Yes | Yes |
| Can additional gifts be made? | Yes | No | Yes | No |
| Age limit due to making the gift? | None | None | Dependent upon trust | Payment beneficiaries must be at least 60 years of age |
| Fees or costs other than personal legal fees? | None | None | Administrative Fees, Trustee Fees | None |

The Foundation is recognized by the Internal Revenue Service as a 501(C)3 tax exempt organization, making your gifts tax deductible.

What can I do now?



Baldrige organizations outperform other organizations in efficiency, effectiveness and financial return. Thirty years of experience with Baldrige has generated substantial data to support that claim. Baldrige-based manufacturers make fewer faulty products. Hospitals provide better care to more people and are saving lives. In Baldrige schools our students perform better, stay in school longer, and teachers are happier. Baldrige offers the ability to mend our broken communities and protect our critical cyber infrastructure. The evidence also shows that Baldrige organizations achieve these outcomes at lower cost.

As with any gift to any organization, you should research and determine your alignment with the organization's mission, vision and values. If you are aligned with The Foundation's vision of "inspiring individuals and organizations to achieve excellence in all that they do with pride and societal responsibility", a gift to us might be the right choice. For more information on the Foundation, please visit baldrigefoundation.org. There, you will find inspirational stories about the remarkable and life-changing impact that Baldrige has had on so many people around the globe.

If our message resonates with you, decide when you would like to give and how much you would like to give. Study the table on this page for a snapshot of which gifts offer the benefits you are seeking, and please contact the Baldrige Foundation at plannedgiving@baldrigefoundation.org for more information or to plan your gift. In all cases, please also consult with your own legal or tax advisor. The Foundation does not provide legal or tax advice.