

**Did you know that creating a lasting legacy is an essential step in planning for your family's future? Do you know that there are ways to preserve your legacy, and also derive tax benefits through your generosity?**



#### **A WILL CAN BE USED TO LEAVE A LASTING LEGACY:**

- IS A LEGAL ROADMAP TO PROTECT YOUR FAMILY**
- SAFEGUARDS YOUR LEGACY**
- PROVIDES FOR CHARITABLE ORGANIZATIONS THAT ARE IMPORTANT TO YOU**
- MAY REDUCE YOUR ESTATE TAXES**

#### **DIFFERENT TYPES OF PLANNED GIFTS:**

- BEQUEST: A SIMPLE BEQUEST IS A PROMISE TO GIVE AN AMOUNT OF YOUR CHOOSING.**
- BENEFICIARY DESIGNATION: THE SELECTION OF WHO WILL INHERIT THE REMAINING BALANCE OF YOUR ACCOUNT(S).**
- ANNUITY: DESIGNED TO MEET RETIREMENT AND OTHER LONG RANGE GOALS BY PROVIDING PAYMENTS TO YOU OR YOUR DESIGNEES.**
- LIFE INSURANCE POLICIES: THE ABILITY TO LEVERAGE ASSETS TO PROVIDE A STATED BENEFIT TO YOUR DESIGNEES IN THE EVENT OF YOUR PASSING.**

\*SME Foundation does not provide legal, tax or financial advice. You are advised to seek the advice of your own legal, tax or financial professional in connection with charitable gift planning matters. This communication, including attachments, cannot be used for the purpose of avoiding tax-related penalties. The regulation of gift annuities varies from state to state.

# Leave Your Legacy

*“To fulfill this charge, each of us must contribute more of ourselves to our Society.”*

*~ Robert S. Shoemaker, 1978 SME President and SMEF Legacy Club member*

There are many ways to leave your legacy with the SME Foundation.

Estate planning with the SME Foundation includes wills, trusts, codicils, annuities, and life insurance policies that transfer assets at a time deemed by the donor. Planned gifts used to fund an endowment are an excellent way to create a lasting legacy. Endowment funds are invested strategically to preserve the original principal and generate interest income to support programs within the Foundation.

## OPTIONS FOR YOUR PLANNED GIFT:

- PH.D. FELLOWSHIP AND CAREER DEVELOPMENT GRANT PROGRAM
- ABET (ACCREDITATION FOR MINERALS PROGRAMS)
- PROFESSIONAL ENGINEERS EXAM PROGRAM (PE)
- MINERALS EDUCATION COALITION (MEC)
- MINERS GIVE BACK
- SCHOLARSHIPS\*

\*Certain restrictions may apply

**The mission of the SME Foundation is to be the source of funding for education and outreach of SME and the community it serves.**



12999 E. Adam Aircraft Circle  
Englewood, CO 80112  
[www.smefoundation.org](http://www.smefoundation.org)  
303.948.4239

**Contact the SME Foundation at 303-948-4239 or visit [www.smefoundation.org](http://www.smefoundation.org) for tools to assist you in leaving a lasting legacy.**

The SME Foundation Legacy Club honors those who have invested in SME's future by including the SME Foundation as a named beneficiary in their estate plans or have reached the Diamond donor recognition level.

We would be pleased to work with you and your advisor to determine the gift that best suits your situation and interests. For confidential information on how to create a legacy gift or for additional information on enrollment in the SMEF Legacy Club, please contact the SME Foundation at 303-948-4239 or [smefoundation@smenet.org](mailto:smefoundation@smenet.org). Visit our website at [www.smefoundation.org](http://www.smefoundation.org)