



The Society for Mining, Metallurgy & Exploration Inc.
12999 E. Adam Aircraft Circle
Englewood, CO 80112-4167

A gift to the Society for Mining, Metallurgy & Exploration Foundation (SMEF) in your will or revocable trust proclaims your confidence that we will continue to fulfill our mission by being the source of funding for education and outreach of SME and the community it serves. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

RESIDUAL BEQUEST: A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to SMEF, located in Englewood, Colorado, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its unrestricted use.

SPECIFIC BEQUEST: Naming SMEF as a beneficiary of a specific amount from your estate is easy:

I give and devise to SMEF, located in Englewood, Colorado, the sum of \$_____ to be used for its unrestricted use.

CONTINGENT BEQUEST: SMEF can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my passing, I give and devise to SMEF, the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its unrestricted use.

RETIREMENT PLAN: You may name SMEF as a beneficiary of your IRA or other qualified retirement benefits. To make a charitable gift from your retirement plan, simply enter the SMEF name and Federal Tax ID #84-1175450 on the Change of Beneficiary Form, available from your plan administrator. Consult with your advisor to determine the benefits you would derive from such a gift.

FOR FURTHER INFORMATION: 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 AnnMarie Estrada, SMEF Manager, at 303.948.4239 or estrada@smenet.org. Visit our website at www.smefoundation.org.

The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.



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Following is an example of how to indicate a general or undesignated gift to the Society for Mining, Metallurgy & Exploration Foundation (SMEF) as part of your Will, or to be submitted as a codicil, for forwarding to your legal counsel and/or estate planning professional.

I, _____, give, devise and bequeath to the SME Foundation (Foundation), of 12999 E. Adam Aircraft Circle, Englewood, CO 80112-4167, a non-profit, charitable organization (Tax ID# 84-1175450) the sum of \$_____; or _____ percent of my estate; or all the rest, remainder and residue of my estate, after all debts, taxes, expenses and other bequests have been satisfied.

This gift is unrestricted and may be used in any way to support SME Foundation activities.

This gift is restricted to the use of: _____.

This is merely a suggestion as to content and should be written or adapted by the donor's legal counsel to fit their personal situation.

Please contact the SME Foundation to discuss suggested language for a designated gift toward a particular program area or to establish a designated fund or endowment. A file copy of your bequest can be sent to the Foundation at the address noted above.

Thank you for including the SME Foundation in your estate plans.

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