



## Keep the Promise for Every Woman – for Generations to Come

Since 1986, our community has made it possible for The Rose to be there for women when they need us. The Rose now helps more than 40,000 women annually and has touched the lives of more than one million women and men over the course of its history.

Now, together, we can build something that endures through The Rose Society – helping ensure that quality breast health care remains within reach for every woman, regardless of her ability to pay.

As a Charter Member, you can help build The Rose Endowment making an extraordinary commitment to the future of The Rose. Gifts can be made through a variety of ways, including naming The Rose as a beneficiary in your will, life insurance policy or retirement plan.

The Rose Society recognizes those who care passionately about women and access to care. If The Rose has touched your life, or the life of someone you love, this is a special opportunity to say thank you. Your gift is more than a tribute; it is an investment in the promise that no woman should die from breast cancer because she lacks access to screening and care.



**Legal Name:** The Rose

**Tax Identification Number:** 76-0193812

**Mailing Address:** 12700 N. Featherwood, Suite 260, Houston, Texas 77034

## **WAYS TO GIVE TO LEAVE A LASTING LEGACY:**

### **1. Include a gift to The Rose in your will or trust.**

**Interested? Suggested next steps:** seek the advice of your financial or legal advisor with this sample language for reference: I hereby direct \$ (or percent of my residual estate or trust) in cash, securities, or other property to The Rose for its unrestricted use.

### **2. Name The Rose as a beneficiary of an IRA, retirement plan, or life insurance policy.**

**Interested? Suggested next steps:** seek the advice of your financial advisor and explore designating The Rose as a beneficiary, typically as follows:

1. Contact your retirement plan administrator, insurance company, bank, or financial institution for a change-of-beneficiary form – or search for it online.
2. Decide what percentage (1 to 100) you would like The Rose to receive and name us, along with the percentage you chose, on the beneficiary form.
3. Return the completed form to your plan administrator, insurance company, bank, or financial institution.

### **3. Consider an IRA Charitable Rollover, a special opportunity for those 70½ years old and older.**

You can give any amount (up to a maximum of \$100,000) per year from your IRA directly to a qualified charity without having to pay income taxes on the money. You may also see this gift option referred to as a qualified charitable distribution, or QCD for short. Also, beginning in the year you turn 72, you can use your gift to satisfy all or part of your required minimum distribution (RMD).

**Interested? Suggested next steps:** seek the advice of your financial advisor and explore making a distribution online or printing and mailing a distribution letter.

**4. Use your Donor Advised Fund.** You can recommend a grant or recurring grants now to make an immediate impact or use your fund as a tool for future charitable gifts. You can also create a lasting legacy by naming The Rose the beneficiary of the entire account or a percentage of the fund. With a percentage, you can create a family legacy of giving by naming your loved ones as your successor to continue recommending grants to charitable organizations.

**Interested? Suggested next steps:** seek the advice of your financial advisor and contact your fund administrator for a beneficiary form.

**5. Establish a memorial or tribute gift.** Honor your connection, or that of a loved one, to The Rose in a meaningful way by supporting the work of our mission in perpetuity. Your memorial or tribute gift will be a lasting tribute and will safeguard the organization you love for generations to come.

**Interested? Suggested next steps:** seek the advice of your financial advisor and contact Shannon Lecoq at 281.464.5151 or [slecoq@therose.org](mailto:slecoq@therose.org) to discuss funding opportunities.

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to The Rose.*

*For more information, please contact Shannon Lecoq, Chief Development Officer, at 281.464.5151 or [slecoq@therose.org](mailto:slecoq@therose.org). All inquiries are confidential.*



## LEGACY GIFT INTENTION FORM

*Please note: Information will be held in the strictest confidence.*

**Thank you for sharing the news of your legacy gift to The Rose Society. Please fill out this form regarding your gift, including as much or as little information as you are willing to share. Thank you for your generosity and commitment to access to quality breast health care.**

### **DONOR INFORMATION**

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### **GIFT INTENTION**

I have included The Rose in my estate or financial plans as follows (please check all that apply):

- |                                             |                                                              |
|---------------------------------------------|--------------------------------------------------------------|
| <input type="checkbox"/> Bequest in my will | <input type="checkbox"/> Individual Retirement Account (IRA) |
| Specific amount: _____                      | <input type="checkbox"/> Life insurance                      |
| Percentage of my estate: _____%             | <input type="checkbox"/> Other                               |
| <input type="checkbox"/> Trust              |                                                              |

Estimated value of the gift: \_\_\_\_\_

Notes: \_\_\_\_\_

### **RECOGNITION**

- ☐ You may list me in The Rose publications and website. My name should read as follows:

\_\_\_\_\_

- ☐ I would be willing to share my motivation for making a legacy gift. Please contact me about including my story on The Rose's website and publications.

- ☐ I wish to remain anonymous.

**If you are comfortable sharing your planning documents, please feel free to attach any copies of your will or trust provisions or any designation forms naming The Rose as a beneficiary.**

**Thanks for your continuing dedication to The Rose!**

**Questions? Contact Shannon Lecoq at 281-464-5151 or [slecoq@therose.org](mailto:slecoq@therose.org). Return this form to [slecoq@therose.org](mailto:slecoq@therose.org) or The Rose, 12700 N. Featherwood, Suite 260, Houston, Texas, 77034, Attn: Shannon Lecoq.**