

## Planned Giving

Marketable securities may be transferred electronically to an account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. Marketable securities may be held or sold. In some cases, marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by the Executive Director in consultation with the Montlure Presbyterian Church Camp Council.

Bequests and Beneficiary Designations under Revocable Trusts, Life Insurance Policies, Commercial Annuities and Retirement Plans. Donors are encouraged to make bequests to Montlure PCC under their Wills, and to name Montlure PCC as the beneficiary under trusts, life insurance policies, commercial annuities and retirement plans.

Charitable Remainder Trusts. Montlure PCC will accept designation as a remainder beneficiary of charitable remainder trusts.

Charitable Lead Trusts. Montlure PCC will accept designation as an income beneficiary of charitable lead trusts.

For more information, please email [bk@montlure.org](mailto:bk@montlure.org)

## Gift Acceptance Policy

The Montlure Presbyterian Church Camp, Inc. (Montlure) solicits and accepts gifts for purposes that will help fulfill and further its mission. Montlure urges all prospective donors to seek the assistance of personal legal and financial advisers in matters relating to their gifts, including the resulting tax and estate planning consequences.

Montlure values its integrity. Gifts that may expose Montlure to adverse publicity, require expenditures beyond Montlure's resources or involve Montlure in unexpected responsibilities because of their source or condition or are not consistent with Montlure's mission will not be accepted.

Montlure Presbyterian Properties, Inc is a subordinate unit of the Presbyterian Church (U.S.A.), and is in good standing and is entitled to the Federal tax exemption granted to the Presbyterian Church (U.S.A.).

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