

# Planned Giving and Endowment Fund



**The Oliver Wolcott Library**  
*Offering excellence in library services  
in the community since 1862.*

THE OLIVER WOLCOTT SOCIETY

**T**he Oliver Wolcott Society recognizes individuals who support the Library by including it in their estate plans. Although the Library keeps the value and details of each planned gift strictly confidential, every person who becomes a member of The Oliver Wolcott Society provides an example for other friends of the Library who have yet to make similar plans.

You may become a member of **The Oliver Wolcott Society** by informing the Library that you have made provisions in your estate plans. To find out more information on planned giving or to inform us of plans you have already made, please return the form on the back of this brochure or call us.

The Library prides itself on offering excellence in library services. We believe that through books, programs, and all the other myriad ways we now and will access information, we discover our inner selves and comprehend the outer world. Literacy, the educated populace, is the foundation of democracy and the root of a truly fulfilling life.

## Our Core Values

- \* *We creatively communicate and attentively listen to ensure that our services are known and relevant to the needs of the community.*
- \* *We are innovative, dynamic risk-takers who embrace new technologies and ideas.*
- \* *We select, initiate and promote materials, programs and services that enlighten, entertain, and inform.*
- \* *We are a welcoming, friendly place for all members of the community.*
- \* *We continuously improve our efficiency and infrastructure by managing our funds and resources wisely and attracting public and private funding.*

# ~ Planned Giving ~

Over the years, generous annual contributions and planned gifts, including outright bequests, have helped the Library fund these services. Today, earnings from planned gifts pay for a large portion of the Library's annual budget. The Library's Investment Committee has established rigorous investment and spending policies. These policies insure that planned gifts not only support the Library's programs now, but also grow over time to finance library activities into the future.

Additional gifts to the endowment fund allow the Library to continue to meet the growing and transforming needs of the community. They assure the intellectual and cultural freedom of our unique community. It allows us to provide the essential and vital services to everyone of all ages in our community.

## Major types of Planned Gifts:

**Current Gifts:** *Giving to the Library Endowment now, including gifts of cash, real estate and/or securities. These gifts can reduce your income tax as well as any potential capital gains on appreciated securities or real estate.*

**Bequests:** *Naming the Library in your will. These bequests will be deducted for estate tax purposes from the value of your estate.*

**Income Gifts:** *Securing fixed annual payments for life by making the gift of a Charitable Gift Annuity. You can take a charitable deduction for part of the value of your Charitable Gift Annuity when you file this year's income tax return. A sizable part of each annuity payment is also income tax-free.*

Your financial advisor or attorney can provide further information about how you and the Oliver Wolcott Library can benefit from planned giving.

I would be interested in finding out more about planned giving to the Oliver Wolcott Library. Please contact me:

Name:

Address:

City:

State:

Zip Code:

Phone: (    )

E-Mail:

I would like to inform the Oliver Wolcott Library that I have made provisions for the library in my estate plans, and would like to become a member of the Oliver Wolcott Library Society.

Name:

Address:

City:

State:

Zip Code:

Phone: (    )

E-Mail:

*Please mail form to:*

**The Oliver Wolcott Library**

Box 187, 160 South Street  
Litchfield, CT 06759

(860) 567-8030 [www.owlibrary.org](http://www.owlibrary.org)

**“Our concern for the future can be tested by how well we support our libraries.”**

~ Carl Sagan