



Rancho Los Cerritos inspires curiosity and respect for the past, enriches understanding of the present, develops excitement for the future and connects people with community, history and culture.

Adobe Heritage Society

“I have other charities and family members who will also benefit from my estate plan, but, I value the role of the Rancho in my youth and yet today ~ so it made sense to designate a percentage of my estate to benefit the home of my grandparents — and for generations to come. “

Barbara Bixby, Blackwell ,Chair



Jean Bixby Smith & Barbara Bixby Blackwell looking over family records in the Rancho Los Cerritos Library



The impression left in children’s minds after exposure to *living* history can inspire and motivate them for a lifetime.

Your investment **TODAY** can leave a lasting impression on the **FUTURE!**

Please consult your financial advisors to chart a course for optional ways to make an estate planned gift that could provide critically needed support to sustain the historic site and its priceless exhibits, valuable curatorial and restoration efforts, education and cultural programming, and more.

Your investment through an estate planned gift to Rancho Los Cerritos may be unrestricted as to its use ~ or restricted for a specific purpose.



Rancho LosCerritos

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www.rancholoscerritos.org



Adobe Heritage Society



**Make a Lasting Investment
In a Community Treasure**

Adobe Heritage Society

If you are inspired by the role Rancho Los Cerritos plays in your life, or the lives of countless children and visitors, consider including the Rancho as one of your favorite charities when you make your planned giving decisions.

Whether your objective in making a planned gift is to maximize your retirement income while receiving a tax savings or to provide a gift in a bequest or other planned giving vehicle, **Rancho Los Cerritos** needs your support.



In response to your generosity, we will recognize your gift in perpetuity, or within your lifetime, as a member of the **Adobe Heritage Society**.

The most common planned gift is in the form of a **bequest** that lists family members and/or organizations who will benefit from your generosity. **A bequest allows donors to give in ways they may not have been able to do during their lifetime.**

Here is some sample language:

“I give, devise, and bequeath to Rancho Los Cerritos which is located in Long Beach, California, for the support of

[endowment, a specific program, etc.] with a ____ % of the residue of my estate;”
or “the sum of \$____” (dollar amount);
or “20 shares of G.E.” (stocks/bonds);
or “my 1930 Antique Car” (tangible property);
or “is the beneficiary designation of ____% of my IRA, 401(K), (or any qualified retirement plan.)”

There are many Legacy Gift options

Cash – A gift of cash is the most direct method to support Rancho Los Cerritos (RLC.) Because of tax savings from a charitable deduction, your ultimate net cost can be less than the actual amount of the gift.

Property – Gifts of appreciated property such as securities or real estate can provide tax benefits as well as relief from decisions to be faced regarding dispersement of estate assets.

Life Insurance – This donation option provides a valuable asset to the Rancho if you no longer need the protection of a paid-in-full policy, or list RLC as sole beneficiary of an irrevocable policy.

Securities – Gifts of stocks, mutual funds, and other securities can provide an alternative to cash gifts, particularly if they have increased in value since originally purchased. This increase provides a value to the Rancho and a preventative act to lessen capital gains tax.

Trusts – Many documents can be created in your lifetime that will provide for future distribution of your assets without extensive probate activity for your estate. These instruments can be amended in your lifetime – while providing a legacy for **Rancho Los Cerritos**.

Rancho Los Cerritos Foundation is a 501(c) (3) organization, recognized as such by the IRS. Your donation is tax-deductible as allowed by law. Our federal tax identification number is 33-0618231.



An Estate Planned Gift, Leaves a Lasting Impression



Our development department will be pleased to work with you and your advisors in crafting a gift plan that best matches your estate objectives – while providing a valuable investment in **Rancho Los Cerritos**.

Please note, all gift options will be reviewed by our financial advisors, with approval of final acceptance by

Tax laws are in constant change and all gifts should be made following consultation with a professional financial and/or legal advisor(s).

Yes, I qualify to become a member of the Adobe Heritage Society, as I have listed the Rancho among the charities who will benefit from my estate planning.

Please contact me ~ I'd like to learn more.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

E-mail: _____