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## Leaving a Legacy

The Harmony Legacy Society honors those people who have told us of their plans to leave a legacy to Mitchell Farm Equine Retirement Inc. (Mitchell Farm). Bequests, charitable trusts and charitable gift annuities, retirement plans, life insurance...all of these vehicles make it possible to provide for Mitchell Farm and issues of equine welfare after you have taken care of family and other loved ones.

As an alternative to amending your current will, consider naming Mitchell Farm a beneficiary of your retirement plan. Simply contact your plan administrator for a change of beneficiary form and designate Mitchell Farm for a percentage of the assets in your IRA, pension plan or an existing or new life insurance policy. This assignment of benefits can be the most tax advantaged way to give.

### Types of Bequests

**Outright Bequest** - You may bequeath a specific item, a specific dollar amount, or a percentage of your estate. Be sure to consult with your advisors to determine the types of assets that are best given to charity and best given to heirs (such as “income in respect of a decedent”, or “IRD” assets which include IRAs, interest on savings bonds and CDs, and other income earned).

**Residual Bequest** - You may bequeath the remainder of your estate to the Foundation after you have made provisions for your family and other heirs.

**Contingency Bequest** - You may bequeath a gift under certain terms or conditions, e.g., only if you outlive your spouse. Charitable bequests can be carefully designed to permit the most favorable tax treatment under a variety of circumstances.

### To become a Harmony Legacy Society member, please sign the letter of intent below.

As an expression of my commitment to Mitchell Farm Equine Retirement, Inc. (Mitchell Farm) and the issues of equine welfare, I declare my intention to help provide for the future of Mitchell Farm with a gift through my will or estate plan.

I understand that I am not making a legal or binding commitment upon my estate by submitting this Letter of Intent.

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

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

In recognition of your generosity, Mitchell Farm would like to include you as part of the Harmony Legacy Society. Please print your name(s) below exactly as you wish it to appear on the Harmony Legacy Society Wall of Honor and in publications so that we may acknowledge your gift according to your wishes. If you choose, you may also indicate that you would like to remain anonymous.

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

Thank you for your thoughtful support.

### Suggested language for insertion in Trusts and Wills:

I give, devise and bequeath [Describe Gift] to Mitchell Farm Equine Retirement, Inc. to be added to and to become part of the Harmony Legacy Fund and to be held and administered in accordance with the agreements, terms and conditions applicable to that Fund.