

# PLEDGE FORM

## CONFIDENTIAL INFORMATION

Name \_\_\_\_\_ Birth date \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Birth date \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Email Address \_\_\_\_\_ Preferred Phone \_\_\_\_\_

## CURRENT GIFTS AND PLEDGES

I/We pledge a total gift of \$ \_\_\_\_\_ to create a fabulous library for our community.

Payment information (check all that apply):

- Outright gift
- Pledge to be paid over \_\_\_\_ 2 yrs \_\_\_\_ 3 yrs \_\_\_\_ 4 yrs \_\_\_\_ 5 yrs starting \_\_\_\_ / \_\_\_\_ / 20 \_\_\_\_ (date)  
or tell us how you'd like to pay your pledge: \_\_\_\_\_  
*Pledge reminders will be mailed annually.*
- Check (Made payable to Lancaster Public Library)
- Credit card:  
Number: \_\_\_\_\_  
Visa \_\_\_\_ Mastercard \_\_\_\_ Discover \_\_\_\_ AmEx \_\_\_\_  
Cardholder's Name: \_\_\_\_\_ Exp: \_\_\_\_ / \_\_\_\_ CCV: \_\_\_\_\_
- Donated stocks or appreciated securities. Please contact me with transfer instructions.

Gift made: \_\_\_\_ In honor of \_\_\_\_ In memory of \_\_\_\_\_

Name(s) as they should appear in donor recognition materials: \_\_\_\_\_

Check this box if you wish to be anonymous

**PLEASE COMPLETE AND SIGN THE REVERSE SIDE.**

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**PLANNED GIFTS**

I/We agree to make the following commitments:

- A bequest through my will
- Gift of real estate
- Gift of life insurance policy
- Charitable Gift Annuity
- Gift from retirement assets (IRA, 401k)
- Charitable Remainder Trust
- Other: \_\_\_\_\_

Estimated value to Lancaster Public Library (for campaign gift valuation): \_\_\_\_\_

I have enclosed the following documentation (e.g., pertinent section of will): \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's signature

\_\_\_\_\_  
Date

**Mail to: Lancaster Public Library, 125 North Duke St., Lancaster, PA 17602**

**Email: [jhall@lancasterpubliclibrary.org](mailto:jhall@lancasterpubliclibrary.org)**

**Questions? Call Jamie Hall, Director of Donor Relations at 717.394.2651 x119**

The official registration and financial information of Lancaster Public Library may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1.800.732.0999. Registration does not imply endorsement.

# WAYS TO GIVE

In addition to **outright gifts of cash**, there are alternative ways of providing generous support for the *Fabulas Campaign*. Lancaster Public Library is a 501(c)(3) nonprofit organization, and contributions to the Library are tax deductible to the fullest extent allowed by law.

## **A MULTI-YEAR PLEDGE**

Donor(s) may choose to make their campaign gifts payable over a period of up to five years with the completion of a written pledge form.

## **A GIFT OF SECURITIES**

Individual supporters may own stocks, bonds, or mutual funds that have appreciated beyond their original cost and may consider making their campaign gift with these appreciated securities. Often, such a gift represents a tax efficient way to support the Library.

## **IRA CHARITABLE ROLLOVER / QUALIFIED CHARITABLE DISTRIBUTION**

Donors age 70½ years or older may consider making a direct transfer of up to \$100,000 annually from their IRA accounts to Lancaster Public Library. The basic details and restrictions to take advantage of this opportunity to support this campaign are as follows:

You must be 70½ or older when you make your gift, and the gift must be made from an IRA. No other retirement plans (such as 401k, 403b, or SEP accounts) qualify.

Although the distribution will be free from income tax, it will not generate an income tax charitable deduction.

This giving option may be of particular benefit for those who do not itemize deductions.

## **PLANNED GIFTS**

There are opportunities for individual contributors to support the work of Lancaster Public Library and its permanent endowment through a planned or estate-related gift.

## **GIFT-IN-KIND**

For some donors, gifts of labor, materials, and equipment—either solely, or in conjunction with a cash gift—will be the most advantageous way to support the campaign. The Library will create a complete listing of labor, materials, equipment, furniture, and technology that are needed and may be donated. The building project team will value each item, and these established values will be used to determine campaign gift credit. Please see the Frequently Asked Questions for more information regarding supporting the project through a Gift-in-Kind.

## **OPPORTUNITIES CREATED BY THE CARES ACT**

The coronavirus relief package passed in 2020 included these incentives for giving:

- For donors who itemize deductions: You can deduct charitable contributions up to 100% of your adjusted gross income (up from 60%).
- For donors who do not itemize deductions: You can take an above-the-line deduction for charitable contributions up to \$300 (or \$600 for married couples filing jointly) that are made in 2020.
- Corporations can deduct up to 25% of their taxable income (up from 10%).

## **OTHER OPTIONS**

Donor(s) may also give from a donor advised fund, a charitable lead trust, a family foundation or a charitable remainder trust. Consult your financial advisor for the best giving vehicle for you.

**For further information about any of these ways to give, please contact Jamie Hall, Director of Donor Relations, at [jhall@lancasterpubliclibrary.org](mailto:jhall@lancasterpubliclibrary.org) or 717.394.2651 x119.**