

GIFTS *through* RETIREMENT ACCOUNTS

One of the easiest ways to make a planned gift to The Corporation for Jefferson's Poplar Forest is by making The Corporation the beneficiary of a retirement account such as an IRA, SEP, 401(k), 403(b), or other retirement plan. This beneficiary designation can usually be accomplished by completing a beneficiary designation form either by mail or online.

Naming The Corporation for Jefferson's Poplar Forest as a partial or full beneficiary of your retirement plan may result in significant income or estate tax savings.

GIFTS *of* PROPERTY

Gifts such as land or houses can also help The Corporation for Jefferson's Poplar Forest. Retaining a life interest in a primary or secondary residence donated to the Corporation gives a donor an immediate charitable tax deduction and the security of knowing family members will not be burdened with the sale of a home or property at some future date.

GIFTS *through* LIFE INSURANCE

A low-cost way to make a significant gift to The Corporation for Jefferson's Poplar Forest is to make the Corporation the beneficiary or owner of a new or existing life insurance policy. If you continue to pay the premiums after the gift of the policy, you can receive an income tax charitable deduction when each premium is paid. Also, the proceeds are removed from your taxable estate at death.

IMPORTANT INFORMATION

Our legal name is
"The Corporation for Jefferson's Poplar Forest."
We are a publicly supported charity under federal tax code sections 501(c)(3).

Our tax identification number is 54-1258296.
We are happy to provide copies of our tax exemption letters and audited financial returns.

The Corporation for Jefferson's Poplar Forest does not provide legal or tax advice. Please seek your own legal or tax advice in connection with gift planning matters.

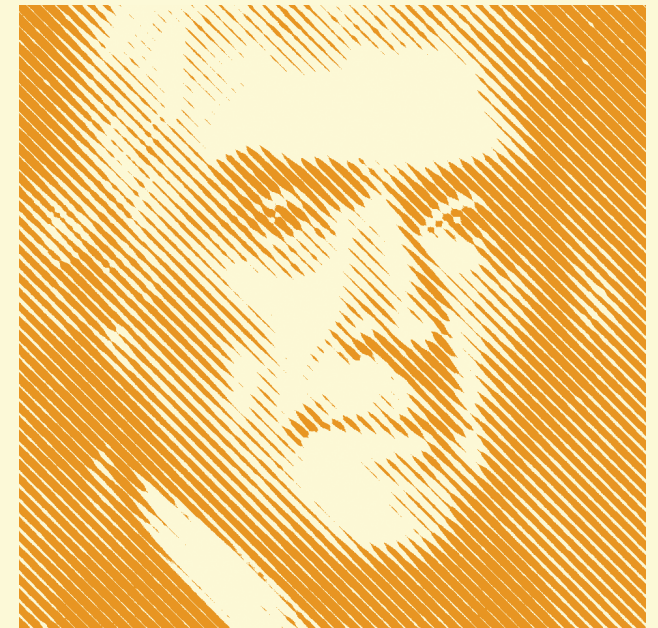


THE THOMAS JEFFERSON CIRCLE
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THOMAS JEFFERSON'S

Poplar Forest

THE
THOMAS JEFFERSON
CIRCLE



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GIFTS *that* PROVIDE YOU *with* LIFE INCOME

Charitable Remainder Trusts. Your advisor might recommend establishing a charitable remainder trust as a tax-advantaged way to make a gift of \$100,000 or more. If established during your lifetime, you will receive an income tax charitable deduction for the value of the remainder that will eventually pass to The Corporation for Jefferson's Poplar Forest. There are two types of charitable remainder trusts:

Charitable Remainder Unitrusts permit you to make a gift yet continue to receive a fixed percentage of the annual value of the gift assets selected by you but at least 5% (the unitrust payment). Following your death, the unitrust payment may continue to a second beneficiary, if you so direct, with the principal finally passing to the Corporation for Jefferson's Poplar Forest on the death of your last beneficiary. After those payments end, the trust's remaining assets are paid to The Corporation for Jefferson's Poplar Forest. Since the unitrust payments change annually based on an annual revaluation of the assets, a unitrust permits you to share in the appreciation (or depreciation) in the value of the trust.

Charitable Remainder Annuity Trusts are similar to charitable remainder unitrusts except that the payments to you or another beneficiary are a fixed dollar amount that will not fluctuate based on the value of the trust's assets. This type of trust may be preferred by those who desire the security of a fixed annual income.

WAYS *to* BECOME *a* MEMBER *of the* THOMAS JEFFERSON CIRCLE

The Corporation for Jefferson's Poplar Forest is a non profit, tax-exempt organization chartered in December 1983 to rescue and preserve Thomas Jefferson's retreat for the educational and cultural benefit of the public. The Thomas Jefferson Circle recognizes donors who make Poplar Forest part of their estate plans.

GIFTS THROUGH YOUR WILL *or* LIVING TRUST

An outright bequest of cash, securities, real estate, or tangible personal property is one way to provide for The Corporation for Jefferson's Poplar Forest in your will. You may indicate a specific dollar amount, a percentage of your estate, or a particular piece of real estate or other property. For suggested language for your attorney's consideration when drawing up a will please e-mail Development@poplarforest.org or call (434) 534-8126.

A residual bequest provides that The Corporation for Jefferson's Poplar Forest receives the "residue," or the balance remaining, of your estate after specific bequests are satisfied. Wills or living trust agreements can also establish trusts that can provide income to another person or persons for life before the principal assets pass to The Corporation for Jefferson's Poplar Forest.

GIFTS *that* PROVIDE IMMEDIATE BENEFIT *to* POPLAR FOREST

Charitable Lead Trusts. A charitable lead trust provides an annual gift of income to The Corporation for Jefferson's Poplar Forest for a period of years, after which the trust's assets would pass to your heirs or others you name, thereby resulting in gift and estate tax savings.