



## **NCRF's Legacy Society**

### **Estate Planning is Critical to Everyone**

- If you don't plan ahead, the government will determine the fate of your assets. Be sure your will is up to date.
- By planning ahead, YOU control where your assets will go. Also, planning ahead gives you peace of mind and lets your family know that they meant enough to you to plan ahead so that they don't have the tremendous stress of straightening out your estate.
- Remember charitable giving in your planning. It has many benefits which not only help you protect your assets but can include impressive tax reductions, avoidance of capital gains taxes, and markedly reduced estate taxes.
- And, you can take advantage of the special benefits that legacy gifts provide.

### **NCRF's Legacy Society**

NCRF has a Planned Giving Program called the Legacy Society. Following is a brief description of the ways you can support NCRF's Legacy Society. These may have important income or estate tax benefits to you and your heirs.

- **Outright Gifts:** Outright gifts can be used immediately. A gift of appreciated stock or mutual fund shares can be particularly advantageous from a tax standpoint since capital gains tax is avoided.
- **Bequests:** While taking care of your loved ones, you can also make a bequest to NCRF's Legacy Society through your will. You can leave a particular asset, a percentage of your estate, or a portion of assets remaining after other specific bequests for your family are made. A bequest to NCRF's Legacy Society is fully deductible for estate tax purposes.
- **Life Insurance:** You can name NCRF as the beneficiary of all or a portion of a life insurance policy. Amounts left to NCRF are fully deductible for estate tax purposes.

### **Additional Benefits**

- You'll enjoy deep satisfaction of knowing that you're returning something to a profession that has been good to you.

- You are really helping your profession by providing critical resources for the continuation of important programs.

### **What NCRF Will Do with Your Support**

- Support court reporting students through NCRF's Student Initiatives Program by (1) awarding scholarships for their education and (2) by paying NCRA student membership dues for students who transcribe two or more histories under NCRF's Oral Histories Program.
- Provide outreach education about our technology to nonreporting groups through our Legal Education Program, where we provide teaching tools for reporters to conduct seminars for law students, first-year lawyers, and judges on how to make a good record; and through our participation at biennial International Court Technology Conferences.
- Raise awareness of our profession to the general public through NCRF's Oral Histories Program, where we partner with organizations to transcribe histories of national significance, such as the Veterans History Project at the U. S. Library of Congress.
- Develop and maintain strategic alliance contacts and partnerships with people and organizations that are directly affected by our profession.
- And more!

### **What is the Legal Designation for NCRF's Legacy Society?**

The legal designation for NCRF's Legacy Society is as follows and should be used for your will or on a beneficiary designation form for a life insurance policy:

“National Court Reporters Foundation, a nonprofit 501(C)(3) charitable corporation organized under the laws of the District of Columbia and having its principal office at 8224 Old Courthouse Road, Vienna, VA, 22182-3808.” Our Federal Tax Identification Number is: 54-1153729.

### **Questions?**

For more information, please feel free to contact B. J. Shorak, NCRF's Deputy Executive Director, on 800/272-6272, ext.126, or by e-mail on [bjshorak@ncrahq.org](mailto:bjshorak@ncrahq.org).

**NCRF strongly encourages you to consult with your personal financial planner, tax consultant or legal counsel when considering a gift of this type to NCRF's Legacy Society or to any other organization.**