

## ABOUT THE SCHOOL

At [Rogers Park Montessori School](#) we seek to create an intimate environment in an urban setting that can nurture all who are a part of the community-children, parents and faculty. We create an educational program of the highest quality guided by the work and writings of Italian physician, scientist and educator Dr. Maria Montessori. At the core, the philosophy is simple: “to follow the child”.



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## PLANNED GIVING AT ROGERS PARK MONTESSORI SCHOOL



*You can Plan  
Gifts that make a  
difference in your  
lives and the lives  
of the children.*

## SHAPING A MONTESSORI LEGACY

Through your caring and generosity, you can help make a tradition of excellence in Montessori education both available and vital to current and future generations of children in the Chicago area.

Your bequest to [Rogers Park Montessori School](#) can help assure that we continue to place the child’s needs as the highest priority by providing them with a learning environment that is adapted to his or her developmental level.

Philanthropy is not for just a select few. The philanthropic spirit is given a voice when your wishes are expressed in your will. Every bequest to [RPMS](#) plants a seed that will continue to grow throughout history.

You can play a major role in perpetuating this remarkable Montessori tradition. By including [RPMS](#) in your estate plan, you will help assure that we can continue to provide an education that prepares the children to take their place as strong responsible adults in this world.

## WHAT YOUR GIFT WILL DO

Today’s economic realities constitute a different and greater challenge than even a few years ago. Your generosity will help us to maintain and increase affordability by limiting tuition increases and providing scholarship assistance. Your gift will help assure that [RPMS](#) remains a leader in Montessori education, even as we stay competitively priced. You will help shape the future of [Rogers Park Montessori School](#).



## MISSION STATEMENT

[Rogers Park Montessori School](#) strives to create an enriched environment so that children are inspired to reach their highest potential using the Montessori philosophy of education. This fosters a strong sense of community and respect for self, others and the environment in order to build a strong academic foundation for a lifetime of learning.

## HOW YOUR LEGACY CAN HELP MAKE A DIFFERENCE

You can help establish a legacy of caring by naming [Rogers Park Montessori School](#) in your estate plan. Here are some suggestions:

### Gifts from Your Will or Living Trust

Your bequest from your will or living trust helps maintain excellence in our programs and facilities. You can leave [RPMS](#) a specific amount or a percentage of the residue after all bills, debts, taxes, specific gifts, etc. have been made. It is the simplest planned gift and one of the most effective.

### Retirement Plans

An excellent asset to consider as a bequest is your retirement plan (401(k), pension plan or IRA). Because retirement plan assets represent tax deferred income, the beneficiaries of the retirement plan at your death will normally recognize taxable income when they receive the assets. Because [RPMS](#) is tax exempt, we will not pay income tax on retirement assets we receive by bequest. And giving your IRA, 401(k) is refreshingly easy. You simply call the company that administers your plan and ask them to send you a new beneficiary designation form. Just fill out the form, including [RPMS](#) to receive all or a portion of the account at death, sign it and mail it back.

### Charitable Remainder Trusts

Charitable Remainder Trusts allow a donor to make a donation to [Rogers Park Montessori](#) and enjoy a generous income stream as well as some tremendous tax advantages. Donors can transfer assets (usually appreciated securities) into a trust that will pay them an annual income for life. They receive a substantial income tax charitable deduction when they create the trust. The trustee can then sell those assets and diversify without triggering an immediately payable capital gains tax. At the end of the trust's term (usually lifetime) the remaining funds go to [RPMS](#).

For our friends with highly appreciated assets and a desire to enrich the lives of children, Charitable Reminder Trusts have tremendous potential.

We are happy to answer any questions.

### Charitable Lead Trusts

This arrangement provides [RPMS](#) with an income from the trust for a term of years, or for the lifetime of an individual. At the end of the payment period, the trust property reverts to the donor or, more commonly, passes to family members. For friends of [RPMS](#) that are trying to minimize gift and estate taxes, the lead trust can help them meet several goals at once.

### Marketable Securities

Stocks and other securities transferred to [Rogers Park Montessori School](#) are tax deductible at their fair market value. Donors are not required to pay capital gains taxes on appreciated securities that have been held for more than one year before being donated.



### Life Insurance Policies

Gifts of fully paid policies or policies for which you are still paying premiums are welcome. You can also name [Rogers Park Montessori School](#) as the beneficiary of your life insurance policy while still retaining ownership of the policy. Structure properly, ongoing premium payments can qualify for a charitable deduction.

***Please note: The information in this brochure is not intended as financial or legal advice. For advice, please consult an attorney or certified financial planner.***

## PLEASE MAIL TODAY

- I would like to know more about how I can leave a legacy to [Rogers Park Montessori School](#). Please call me: I have some questions for you.
- I have already named [Rogers Park Montessori School](#) in my estate plan.
- I would like to help [Rogers Park Montessori School](#) here and now.
- My check for \$\_\_\_\_\_ is enclosed.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Or Contact

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