

**LEAVING A
CHARITABLE
LEGACY FOR A
FAVORITE CAUSE
OVERSEAS**



myriad
usa

A legacy fund at Myriad USA is an exciting tool to provide continued support - forever or for a specific number of years - to the causes you cherish, anywhere across the globe.

You can contribute to your fund during your lifetime, or through a bequest or other planned gift, such as naming your fund as beneficiary of a retirement plan or life insurance policy.

When you open your legacy fund, you can handpick a beneficiary organization such as a museum you cherish or the university where you studied. Alternatively, you can choose to focus on a particular issue that matters most to you in the city or country of your choice – promoting science education in Nigeria, or preserving cultural heritage in the city of Florence, Italy, for example.

With Myriad USA, you will gain a knowledgeable and reliable partner. Year after year, we will make sure that your charitable legacy lives on, benefiting the causes that are close to your heart.



PROMOTING EXCELLENCE IN MUSIC IN ESTONIA

Award-winning television producer Ene Riisna's love for music, for her parents and for her native Estonia are inextricably linked. With her husband James Greenfield, she established a legacy fund to support future generations of talented musicians in Estonia. **The Eduard and Olga Riisna - Nadia Roose Fund** was named for her parents and for her aunt Nadia.

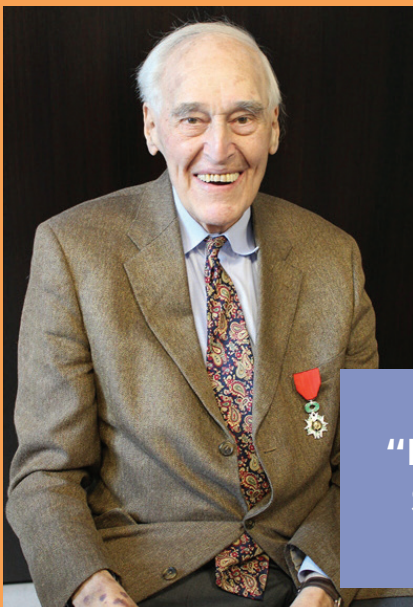
"I WANTED TO HONOR THE THREE OF THEM, BECAUSE THEY BROUGHT JOY AND MUSIC INTO MY LIFE."

BUILDING A FUTURE FOR A CHERISHED GREEK VILLAGE

Tony Julius left his seaside village of Kyparissi, Greece, at the beginning of the 20th century, seeking a better future in the United States. But he never forgot his roots. Today, his **Tony Julius Legacy Fund** supports initiatives that promote the wellbeing of Kyparissi residents, with special attention for those that provide job opportunities for younger generations.



"WITH THE NEW CLIMBING ROUTES, THE TOURISM SEASON NOW COVERS SEVEN MONTHS A YEAR."



SHARING ONE'S PASSION FOR MEDIEVAL FRANCE

Professor Giles Constable is passionate about the Middle Ages. In 2015, his library on the medieval church became the cornerstone for a new research center in Cluny (France) - once the seat of the most powerful monastery in Europe. Two years later, he established the **Cluny Medieval Library Fund** to provide continued support for this ambitious initiative.

"I WANT MY LIBRARY TO REMAIN ACCESSIBLE TO SCHOLARS INTERESTED IN MEDIEVAL HISTORY."

HOW DOES IT WORK?

OPENING A FUND THAT MEETS YOUR NEEDS

You may establish a legacy fund with a contribution of \$250,000 or more. Your fund can provide continued support to a favorite organization overseas, or advance a particular issue that is dear to your heart, in the city or country of your choice. You may choose for your fund to exist in perpetuity or instruct us to spend all assets in a specific number of years. We will work with you to structure your fund so that it meets your needs and matches your passions.

CONTRIBUTING TO YOUR FUND WHEN IT MAKES SENSE FOR YOU

You can contribute to your legacy fund during your lifetime and claim an income tax deduction for such contributions. You can do so through a charitable bequest as well, and your estate will benefit from an estate tax deduction. You can also name your fund as the beneficiary of a retirement account or life insurance policy. An overview of planned giving options is included in this booklet.

INVESTING ASSETS TO GENERATE REVENUE

The assets of your legacy fund will be invested, under the guidance of our Investment Committee, allowing them to earn income and grow tax-free over time. When establishing your fund, you can select one of our three investment pools for the allocation of your assets or, with a fund balance of \$750,000 or more, you may recommend that their management be entrusted to an investment advisor of your choice.

SUPPORTING THE CAUSES YOU CHERISH

Each year, we will disburse a sustainable percentage of your fund's assets to nonprofit initiatives overseas, in line with your wishes and instructions. If you intended to provide continued support to a favorite organization, we will work with that organization to identify specific initiatives to be supported. If your fund was established to advance a specific issue, we will identify the top nonprofits active in the designated geography and support those that achieve the greatest impact.

Even if you intend to contribute the bulk of your fund's assets through a testamentary gift, you may wish to establish your fund now. It's a simple and straightforward process, and doing so would be prudent financial planning. To open your fund, please contact our Chief Executive Officer Jean Paul Warmoes at (212) 713 7660 or jeanpaul@myriadusa.org

FEE STRUCTURE

To help us cover our operational expenses, Myriad USA charges a management fee of 70 basis points – or 0.7% of the invested assets per year. This fee structure is all inclusive – there are no other legal, maintenance or investment fees.

A WIDE RANGE OF GIVING OPTIONS

GIFTS DURING YOUR LIFETIME

Gifts of cash are deductible up to 60% of adjusted gross income in the year of the contribution, with a five-year carryover for the excess not used. If you contribute appreciated stock or other real property, capital gain taxes are eliminated, and you can take a charitable deduction for the fair market value of the gift, up to 30% of your adjusted gross income.

BEQUESTS

You can bequeath a specific dollar amount, property to be sold, or a percentage of your residual estate to an existing legacy fund, or to a legacy fund to be established at Myriad USA. Your estate will receive an estate tax charitable deduction for the amount of the gift. We can provide you with sample language to include in your last will and testament.

LIFE INSURANCE POLICIES

You can name your legacy fund as the beneficiary of a life insurance policy that is no longer needed to provide for dependents. While the value of the policy will be included in your estate, an offsetting estate tax charitable deduction will be allowed.

RETIREMENT PLAN ASSETS

If you designate your legacy fund as the beneficiary of a retirement account upon your death, there will be no estate taxes to be paid, nor income taxes on distributions.

CHARITABLE REMAINDER TRUSTS

With a charitable remainder trust, a contribution of cash, securities or other assets is placed in a trust. The trust makes an annual payment to one or more beneficiaries, for life or for a specific number of years. When it terminates, the remaining assets are transferred to your legacy fund. You will benefit from an immediate income tax deduction and avoid capital gain and estate taxes.

CHARITABLE LEAD TRUSTS

With a charitable lead trust, your legacy fund receives an annual payment from the assets placed in trust or from their earnings, for a specific number of years. When the trust terminates, the assets return to you, to your estate, or to your heirs, who may benefit from significantly reduced gift and estate taxes.

Consult your legal advisor to see how the above tax rules apply to your specific circumstances.

Myriad USA facilitates thoughtful, effective giving across borders - it is a trusted advisor to U.S. donors seeking to support their favorite causes and nonprofit organizations overseas. We provide customized solutions to match the needs of our donors, with the boutique level of service that they expect.

**For any questions or to open your legacy fund,
please contact Jean Paul Warmoes, CEO,
at jeanpaul@myriadusa.org or (212) 713-7660.**

