

Sustained Support for Cherished Communities Across the Globe

With a Legacy Fund at Myriad USA, you can provide continued support to the causes you cherish, anywhere across the globe, forever or for a specific number of years. Myriad USA is a knowledgeable and reliable partner that can help you fulfill your giving goals and sustain the organizations and communities close to your heart.

HONORING YOUR INTERESTS

Myriad USA will work with you to structure your fund so that it supports the causes or organizations that are important in your life. Your fund can provide continued support to a favorite organization or advance an issue you care about in the city or country of your choice. You can also name your fund in honor of a loved one or a family member.

CREATING A FUND ON YOUR TIMELINE

Legacy Funds require a \$250,000 balance to begin grantmaking. You can make gifts to your fund all at once or over time, now or later. Many people like to include a charitable gift in their will, or give via a trust, a retirement account, or a life insurance policy. Myriad USA can help you consider your options and give in a way that is easy and tax smart.

INVESTING ASSETS FOR LONG-TERM SUPPORT

Your fund assets will be invested, under the guidance of Myriad USA's Investment Committee, allowing them to earn income and grow tax-free over time. You can select one of Myriad USA's investment pools or, with a fund balance of \$750,000 or more, recommend an investment advisor of your choice.

GRANTING TO FULFILL YOUR GOALS

Each year Myriad USA will grant a percentage of your fund assets to nonprofit initiatives abroad, based on the objective and the timeline described in your fund agreement. For forever funds, the annual distribution percentage is set by the Board of Myriad USA.

If you choose a favorite organization, Myriad USA will work with that organization to identify specific projects or programs to support. If your fund is created to advance an issue you care about, Myriad USA will identify effective and impactful organizations that address your interest in your chosen geography.

FEES

Legacy Funds are subject to an investment fee of 70 basis points (i.e., 0.7% of the invested assets per year), or a flat fee of \$1,750, whichever is greater. This fee structure is all inclusive – no fees will be charged on grant distributions, and there are no other legal, due diligence or maintenance fees.

START A CONVERSATION

To discuss how a Legacy Fund may help you support the communities and causes you care about, contact Rebecca Stibbe, Director of Family Philanthropy, at 651-386-2250 or rebecca@myriadusa.org.



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 be funded through a charitable bequest, that will support future generations of talented musicians in Estonia. She also chose to honor her parents and aunt with the fund name: The Eduard and Olga Riisna - Nadia Roose Fund.

Providing Clean Water in Burkina Faso

As a Peace Corps volunteer in the late 1960s, Robert Coffey worked in the West African country of Burkina Faso to construct wells. Because they kept out contaminated water, they had an immediate impact on the health of local communities. Today, he supports Association Omigbefite, a local organization working to improve access to clean water in Burkina Faso. Through his newly established Burkina Faso Development Legacy Fund, he will be able to do that for years to come.



Ways to Give

Give Today

CASH

Cash is a quick and easy way to make a gift while also taking advantage of potential income tax benefits in the same year.

APPRECIATED SECURITIES

Gifts of appreciated, publicly traded stock may provide an income tax deduction and may also help you avoid capital gains tax.

REAL ESTATE OR OTHER PROPERTY

Donate your home or other property to charity, and you can remove the work of managing or selling it, while receiving potential tax benefits. You also can donate your home and still live there for life.

CRYPTOCURRENCY

Various cryptocurrencies can be donated to Myriad USA, and by gifting it, you may avoid capital gains tax.

BUSINESS INTERESTS AND CLOSELY HELD STOCK

If you own a business or hold stock in a closely held corporation, you may benefit from a tax deduction by donating these assets.

Give Later

GIFTS THROUGH YOUR WILL

Making a gift through your will is easy, and it also may reduce your taxable estate. This kind of gift has no cost during your lifetime, but it has the potential to have a perpetual impact.

RETIREMENT ASSETS

Your 401(k), IRA or other retirement plan may be taxed significantly if passed on to your heirs, yet it's tax free to charity and can be used to support the causes or geographies you care about.

BANK OR BROKERAGE ACCOUNTS

You can name your Legacy Fund at Myriad USA as the beneficiary of a bank or brokerage account, simplifying the estate administration for your heirs.

LIFE INSURANCE

By donating a life insurance policy or naming your Legacy Fund at Myriad USA as a beneficiary, you may be able to claim a tax deduction or reduce your estate tax liability.

CHARITABLE REMAINDER TRUST

This allows you to make a charitable gift, receive income throughout your lifetime or for a specific number of years, and also potentially receive tax benefits.

Myriad USA does not provide legal, tax, or investment advice and encourages all donors to consult with their professional advisors to determine the best options for their individual situations. Myriad USA is a U.S. 501(c)(3) public charity (EIN: 58-2277856).

MYRIAD USA FACILITATES THOUGHTFUL, EFFECTIVE GIVING ACROSS BORDERS