

## Memorial Life Membership

The Mountain's Memorial Garden is a serene natural setting where loved ones ashes may be scattered. Memorial Life Membership gifts of \$1500 are recognized by featuring the honoree's name on an engraved plaque in Heritage Hallway.

## June Cravens Sholin Tower Society

All those who make an outright gift or a planned bequest\* to The Mountain Endowment Fund are recognized for their sustaining generosity as part of the June Cravens Sholin Tower Society.



The Mountain Retreat & Learning Center  
P.O. Box 1299, 3872 Dillard Road  
Highlands, NC 28741  
(828) 526-5838 ext. 254  
[development@themountainrlc.org](mailto:development@themountainrlc.org)  
[endowmentfund@themountainrlc.org](mailto:endowmentfund@themountainrlc.org)



**A place. An experience.  
A way forward for all ages.**

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## PLANNED GIVING

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Be part of The Mountain's  
future by arranging a  
planned gift today!

[www.themountainrlc.org](http://www.themountainrlc.org)

## Planned Giving

A bequest may be conveyed through a will or a trust, such as in the form of a **revocable living trust** (can be changed or reversed) An existing will or trust does not need to be rewritten to include charitable bequests—you may add a **codicil** or amendment to your current estate plan.\*

Here are **examples** of how some donors have included The Mountain and/or Mountain Endowment Fund in their will or trust:

*I hereby give, devise, and bequeath to **The Mountain Retreat & Learning Center, Inc.**, EIN #58-1396972, P.O. Box 1299 (3872 Dillard Road), Highlands, NC 28741....*

And/Or...

*I hereby give, devise, and bequeath to **Mountain Endowment Fund** EIN#56-2190319, P.O. Box 1299, (3872 Dillard Road), Highlands, NC 28741....*

*The sum of \$\_\_\_\_\_ or \_\_\_\_\_  
(description of specific property)*

*\_\_\_\_% of my estate owned by me at the time of my death. The rest, residuary and remainder of my estate.*

For a copy of The Mountain's Gift Acceptance Policy, email: [development@themountainrlc.org](mailto:development@themountainrlc.org)

\*Please consult with your personal financial advisor for information on how to best plan your bequest.

## Gifts of Stock & Securities

Gifts of stock or securities may be transferred by Depository Trust Clearing (DTC) Stock Transfer or by mail through The Mountain's TD Ameritrade account. A DTC Stock Transfer is quicker and easier, but if you have a stock certificate the transfer may be done by mail. Please notify our Finance Director or the Mountain Endowment Fund Treasurer of the actual date of the transfer or mailing so that the transaction can be monitored.

### Wake Now Our Vision Umbrella Giving

The Mountain and Mountain Endowment Fund are eligible to receive a 10% Legacy Challenge matching donation for all qualifying legacy gifts pledged to the UU collaborative campaign called *Wake Now Our Vision*. For planned gifts to qualify, they must be pledged through the Unitarian Universalist Association's Umbrella Giving Program. This is done by using the Wake Now Our Vision pledge form with attached instructions for distributing the gifts to The Mountain or Mountain Endowment Fund.



\*Please consult with your personal financial advisor for information on how to best plan your bequest.