



PLANNED GIVING

Name the Friends of the Library as your Beneficiary or in your Will or Codicil

Through the generosity of private contributions and gifts, the Friends of the Library funds many of the Collier County Public Library's superb programs and activities. These programs and activities further learning, encourage reading and broaden the horizons of the community throughout Southwest Florida.

These programs and activities include:

- Nick Linn Lecture Series presenting nationally known authors
- Bagels and Book Club Breakfasts (over 70 clubs) and Non-Fiction Lecture Series
- Adult and Children's Programs (over 100 annually) at all library branches
- Personal assistance for computer, tablet and smartphone users (LEAP Program)
- Genealogy Programs and Electronic Databases

You can learn more about all the activities the Friends fund, support or assist by clicking on the Friends Fact Sheet link or picking up a Friends Fact Sheet at the Friends office located in the Naples Regional Library.

However, we simply can **NOT** continue to do all of our programs and activities without your support.

How you can help

You can help the Friends continue their programs and funding in support of the Collier County Public Library through planned giving by including the Friends in your estate plan. Planned giving is commonly called a bequest or a legacy gift. It requires little effort. Most gifts of this type are for either a stated dollar amount or a percentage of the estate. They can be limited to being given only if your estate has assets left after satisfying your other wishes regarding your heirs and other matters important to you.

You do not have to write a new will or trust document. You can add the Friends as one of your beneficiaries through a codicil or trust amendment. Most bequests to the Friends are not subject to federal estate tax. Remember the Friends are a charitable nonprofit organization exempt from federal taxation. It is not a branch or agency of any government.

Life Insurance, IRA or Retirement Plan

Another easy way to help is to name the Friends as a beneficiary under a life insurance policy, an IRA or a retirement/401(k) plan if the plan permits. Under existing tax rules a rollover from an IRA to the Friends while you are alive may also be tax beneficial to you.



Planned Giving

Many reasons exist for one to want to make a planned gift. It can serve to honor a loved one, recognize the efforts or actions of other individuals or organizations while providing critical financial support to the Friends and indirectly to the Collier County Public Library system. Planned Giving costs you nothing now. Notwithstanding, it may give you great satisfaction knowing the Friends programs and actions your future gift will enable to continue. If you notify us of your gift, you will be recognized in the Friends Newsletter and other donor publicity. We respect and will honor those who wish to remain anonymous but allowing your recognition encourages others to do the same.

Sample Language for a Planned Gift to the Friends

The following are examples of language to make a bequest in your will or a codicil to the Friends.

“I give XX dollars to the Friends of the Library of Collier County, Inc.”

Or

“I give XX percent of my estate (or, the residue of my estate) to the Friends of the Library of Collier County, Inc.”

To designate the Friends under a retirement or 401(k) plan, contact the plan administrator identified in the plan’s summary plan description provided to you. Request a free copy if you no longer have it. For an IRA of any kind, contact your IRA custodian (bank, insurance company, mutual fund) and contact the insurance company regarding any life insurance policy. Each of these entities will have a method of properly selecting or changing a beneficiary under them and usually have a short form to do this.

How to notify us of your gift

Please notify us of your gift by calling 239-262-8135 or sending us a note to Friends of the Library, 650 Central Avenue, Naples, Florida 34102. Then we can thank you for your future gift and recognize your generosity (unless you desire to remain anonymous). Also please do not hesitate to contact us if your attorney, estate planner or you have any questions concerning legacy gifts to the Friends or about Friends activities. And please consider becoming a member of the Friends today.