

# The Heritage

SOCIETY of THE ASPEN INSTITUTE

News & Gift Planning Ideas for Friends of the Aspen Institute

Winter 2016

## Investing in the Future

I am grateful for friends of the Aspen Institute like you who support our work and help move the needle on a range of issues that are important to society. The new year brings an opportunity to look back, and also to plan for the future.

As we reflect about the many challenges facing our world today, the Aspen Institute is proud to cultivate leaders who are finding innovative and collaborative ways to generate solutions with staying power. We serve as the unbiased convener for candid conversations around critical issues—to bring the experts together for meaningful dialogue and move beyond demagoguery and talking points.

### Supporting our mission

Our ability to cultivate leadership and provide a venue for collaboration is only possible with the support of our generous family of donors. In this issue of *The Heritage Society* newsletter, we are pleased to recognize two generous trustees who have committed planned gifts to support this mission at the Aspen Institute for generations to come.

You'll also find some highlights of a few accomplishments at the Institute from 2015 and exciting plans for 2016. Finally, this newsletter includes valuable information about the various types of planned gifts that could work best for you.

I hope you will consider investing in the future of the Aspen Institute by making a planned gift this year. By including the Aspen Institute in your estate plans, you will join the Heritage Society alongside other close friends and generous supporters who have established a similar legacy at the Aspen Institute.

Please do not hesitate to reach out to the Aspen Institute's Irene Lukoff, Vice President of Philanthropic Partnerships, at [Irene.Lukoff@aspeninstitute.org](mailto:Irene.Lukoff@aspeninstitute.org) or 202-736-2532 with any questions or to confidentially discuss your philanthropic goals.

Thank you again for your support over the years. I look forward to seeing you soon.



All best,

A handwritten signature in black ink that reads "WALTER". The signature is stylized and written in all caps.

Walter Isaacson

**Inside:**

**A lasting legacy • Maximize the value of your charitable gifts**

# A Lasting Legacy



**T**rustee **Robert J. Hurst** pledged an exceptionally generous bequest to support the Aspen Institute endowment. This visionary investment builds upon the legacy that Soledad and Robert Hurst have already established through the creation of the Hurst Lecture Series and Hurst Community Fund. These Aspen-based programs have enabled the Institute to expand its seminar offerings for young people from diverse backgrounds, and brought stimulating and inspiring speakers to the Aspen Meadows campus to discuss a variety of topics that are both timely and timeless.

*“Over the years, we have been pleased to witness and support the growing cultural and intellectual impact of the Aspen Institute—both here in the Roaring Fork Valley and around the world. We have had a bequest in our will to the Institute for some time and decided to formalize it as a statement of support and confidence in this exceptional organization. We are proud to help the Institute reach new heights of influence for generations to come.”—Soledad and Robert Hurst*

## Gifts Take Many Forms

Back when you purchased a life insurance policy or began a retirement savings plan, you were asked to name a beneficiary to receive the proceeds or assets remaining in the account after your lifetime. We hope you’ll consider naming the Aspen Institute as a beneficiary to receive all or a part of insurance or retirement plan benefits. Similar arrangements can also be made in the case of bank and brokerage accounts. Like bequests from wills and trusts, such gifts can result in welcomed estate and/or income tax savings. To add the Institute as a beneficiary, you will fill out a simple form.



**T**rustee **Jerry Greenwald** and **Glenda Greenwald** pledged a legacy gift to permanently endow the Greenwald Pavilion on the Aspen Meadows campus. Built in 2005 with the Greenwalds’ generous support, the space has hosted some of the Institute’s most memorable conversations and speakers, especially during the Aspen Ideas Festival and programs throughout the summer. This generous endowment will ensure that the Greenwald Pavilion is maintained in beautiful condition in perpetuity and continues to host open-minded discussions and foster the sharing of great ideas.

*Jon Batiste and Wynton Marsalis performing in the Greenwald Pavilion during the 2015 Aspen Ideas Festival.*

# Maximize the Value of Your Charitable Gifts

**D**eciding when and where to make your charitable gifts is worth careful consideration. It's important to consider what kind of planned gift to make because certain assets may actually enable you to increase the value of your gifts.

For instance, noncash assets can provide extra tax savings not available from gifts of cash. The following assets can be excellent choices when you consider what to give:

- **Stocks**
- **Bonds**
- **Shares in mutual funds**

These and other resources can be used to make gifts that enhance the value of your contributions without costing any more than a gift of cash.

Different methods of giving enable you to meet changing needs over time. If you would like more information or to discuss your particular circumstance—in confidence and with no obligation—return the enclosed card or contact us.

## Sample Bequest Language

“I give, devise and bequeath \_\_\_% percentage of my estate or \$\_\_\_\_\_ fixed dollar amount to the Aspen Institute, a 501 (c) (3) qualified nonprofit organization, located in and existing under the laws of the State of Colorado, and with the principal business address of One Dupont Circle, NW, Suite 700, Washington, DC 20036. Tax identification number: 84-0399006. I would like to support general-use scholarships (and/or) the Aspen Institute Endowment.

Should you prefer to restrict your bequest to a particular program the following language would be appropriate:

“I give, devise and bequeath \_\_\_% percentage of my estate to benefit \_\_\_\_\_ (for example, the Aspen Global Leadership Network) program at the Aspen Institute, a 501 (c) (3) qualified nonprofit organization, located in and existing under the laws of the State of Colorado, and with the principal business address of One Dupont Circle, NW, Suite 700, Washington, DC 20036. Tax identification number: 84-0399006.”

**T**ell us if you have already included the Aspen Institute in your estate plan so that we may welcome you to the Heritage Society, which recognizes friends who name the Institute as a beneficiary of a future gift. If you wish to remain anonymous, you may do so. All inquiries remain strictly confidential.



# Reflecting on Our Impact. Planning for the Future.

The Aspen Institute has a rich history of bringing together leaders to address the most pressing issues of our time. Every year, our world faces new challenges and the Institute takes action. Planned gifts help ensure that the Institute has the resources to expand our impact for generations to come.

Below are three highlights from 2015 and exciting plans for the new year and beyond.

## Success in 2015

- 1) Scholars and Scholarships Campaign:** We successfully exceeded a \$100 million campaign goal, the largest in our history, which expanded the Institute's reach through public programs, raised scholarships for young leaders, and fueled a range of important new fellowship programs. We look forward to building upon the success of the Campaign in order to continue introducing the Institute's work to diverse audiences across the country.
- 2) Summit on Inequality and Opportunity:** A collaborative effort between multiple Aspen Institute policy programs, the summit convened nonprofit leaders, policymakers, and concerned citizens for a full-day summit accompanied by brainstorming and networking sessions. Featured speakers included Vice President Joseph R. Biden, Baltimore City Health Commissioner, Dr. Leana Wen, and internationally acclaimed poet and teacher, Clint Smith.
- 3) Youth and Engagement Division:** The Institute launched a new division that will be responsible

for integrating younger voices into our existing policy programs and events, expanding existing youth-focused programs like the Aspen Challenge, Teen Socrates, and AspenX, and developing new seminar and leadership programs designed specifically to empower a new generation of leaders.

## Plans for 2016

- 1) Finance Leaders Fellowship:** Modeled on the original Henry Crown Fellowship, this new fellowship will spur leaders in the finance industry to consider the values and perspectives necessary to build the 'good society' and practice an enlightened stewardship of the global financial system.
- 2) The Stevens Initiative:** A lasting tribute to the legacy of Ambassador Christopher Stevens, this multi-lateral public-private partnership uses the latest communications technology to foster understanding and facilitate cultural exchanges by connecting young people in the United States, the Middle East, and North Africa.
- 3) Future of Work Initiative:** The Institute is leading a year-long nonpartisan effort to identify concrete ways to advance the economic interests of Americans while enabling more of our businesses to do well by doing good. Senator Mark Warner and Purdue President and former Governor of Indiana, Mitch Daniels, are honorary co-chairs.



Contact the Vice President of Philanthropic Partnerships for more information on how to include the Aspen Institute in your estate plans.

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