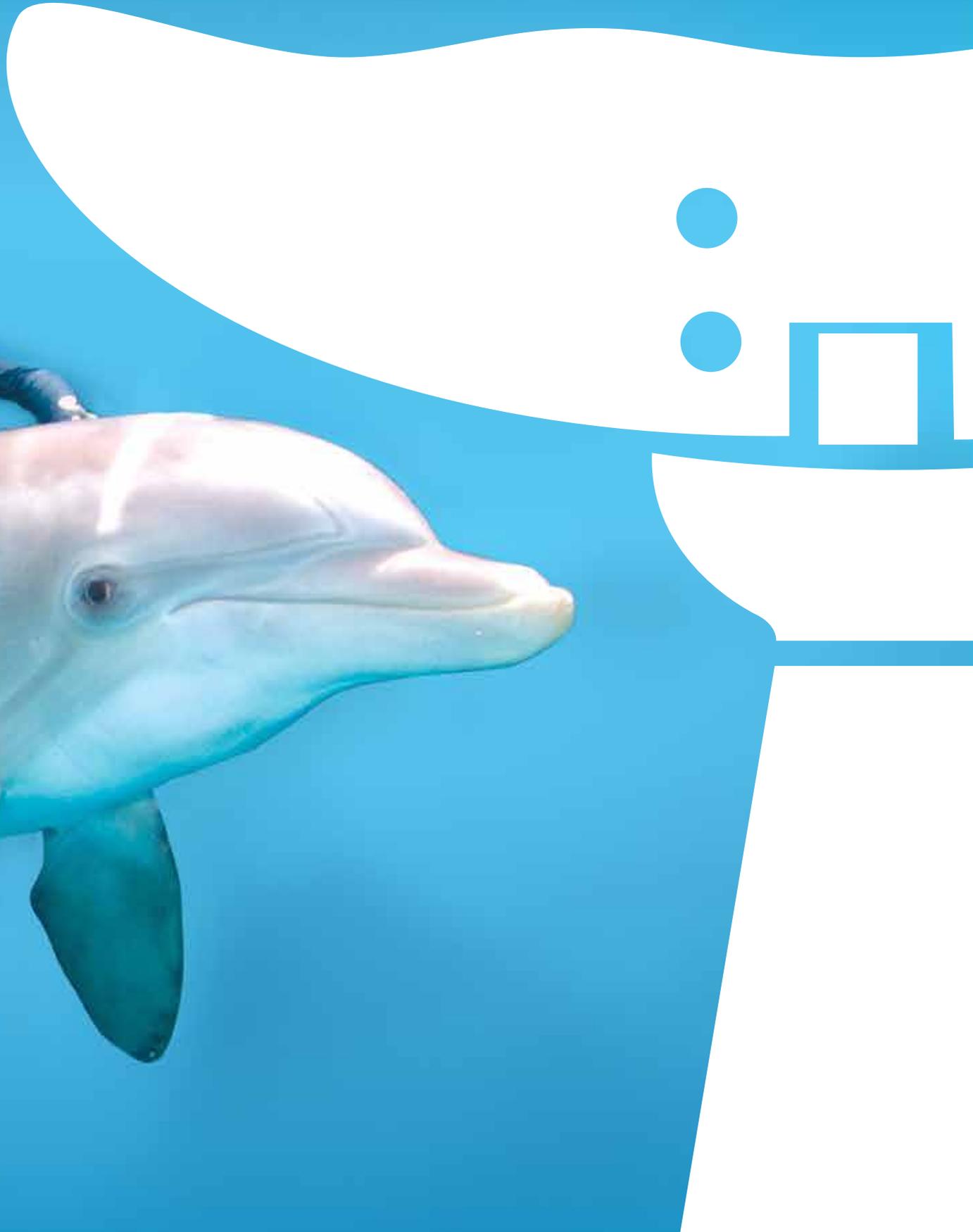


# WINTER'S LEGACY





CLEARWATER MARINE  
AQUARIUM™

## OUR MISSION

We believe in preserving our marine life and environment while inspiring the human spirit through leadership in education, research, rescue, rehabilitation, and release.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800) 453-7352 WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

# WINTER'S LEGACY



# GIVE A GIFT THAT GIVES BACK



GERI TRAUTLEIN

My husband Ray and I moved to Clearwater in 1979. We fell in love with all that Clearwater had to offer with the beach, boating and living on the water. We have been supporters of CMA since Sunset Sam, a bottlenose dolphin arrived. When I saw what was going on with all the new improvements and the hours the staff was putting in, it was overwhelming to me. I see how the staff and volunteers care so much for these animals. It touched my heart so much that I wanted to do something to help.



# OUR MISSION

Founded in 1972, the CMA mission is to preserve our marine life and environment while inspiring the human spirit through leadership in education, research, rescue, rehabilitation, and release.

CMA, a nonprofit 501(c)(3) organization, relies on generous tax-deductible donations, admission fees and membership dues to meet its daily operating and animal care needs. While admission fees cover most of our daily operating needs, it is not enough to cover the cost of fulfilling our mission. Each day our staff and volunteers work tirelessly to provide quality care to our many resident and rehabilitating marine animals, while educating our community and visitors on marine animal safety and conservation.



By making a planned gift, you ensure the future of CMA. You become part of a dedicated group of individuals that understand the importance of continuing the success of the marine animal rescue, rehabilitation and release components of our mission.

There are many ways to support our programs through a variety of planned gifts. Some of those ways include bequests, annuities, charitable remainder trusts, life insurance policies or outright cash gifts. Please use this booklet to help you decide what the best method is for you.



# WAYS TO GIVE BACK

	<b>Direct Gift During Lifetime</b>	<b>Charitable Bequest in a Will</b>	<b>Retirement Plan/ IRA Rollover</b>	<b>Charitable Remainder Trust</b>	<b>Charitable Lead Trust</b>	<b>Life Insurance</b>	<b>Real Estate or other Property</b>
<b>Description</b>	Gift of cash, in kind donations or securities.	Gift Made by naming CMA in your will and a revocable trust.	Gift made by naming CMA as a beneficiary of all or part of your retirement plans.  The IRA Charitable Rollover allows individuals ages 70 ½ or older to donate up to \$100,000 from their IRAs without having to include such distributions as taxable income.	Cash, securities or other property donated during donor’s life or death to an irrevocable trust that pays income to you or another beneficiary(ies) during their lifetimes with the remainder to CMA.	Cash, securities or other property donated during donor’s life or death to an irrevocable trust that makes payments to CMA during the life of the donor and/or other beneficiaries or for a period of years.  After such period, the remainder is paid to donor and/or other beneficiaries.	A gift of an old or new policy to CMA or CMA named as a beneficiary of all or part of the policy.	A gift of real or other property outright or with a donor retained interest to use certain property during his or her lifetime.  (Real Estate gifts are evaluated on a case by case basis)
<b>Tax Benefits</b>	Immediate charitable income tax deduction for the value of the gift and in certain circumstances, no capital gain tax on appreciated assets.	Estate tax deduction for the value of your bequest to CMA.	Avoids estate and income taxes on the portion distributed to CMA.	Charitable income or estate tax deduction or possible deferral of capital gains tax.	Gift tax charitable deduction (during life of donor) or estate tax charitable deduction (established at death of donor) equal to value of payment stream to CMA. Income tax deduction may be available.	When the policy lists CMA as the owner and beneficiary an immediate charitable income tax deduction is available. Estate tax deduction possible when CMA is listed as a beneficiary.	Immediate charitable income tax deduction for the value of the gift and in certain circumstances no capital gain tax on appreciation.
<b>Additional Benefits</b>	You are able to specify where funds are directed and see the results of your contribution.	You can tailor your bequest to meet your family’s needs first.	An optimal gift to CMA which would otherwise may be a tax burden if given to heirs.	Provides annual income for donor or other beneficiaries.	Allows donor to pass assets to heirs.	Allows for a significant gift to CMA with relatively little expense.	Allows for a significant gift to CMA of a possibly highly appreciated asset.
<b>Income from Donation to Donor</b>	No	No	No	Yes, with a fixed or variable amount, subject to the requirements of the Internal Revenue Code.	No, but donor or other beneficiaries receives trust remainder at the end of the payment term.	No	No
<b>Level of Complexity</b>	Low	Low	Low	High	High	Medium	High
<b>Timing for Charity to Receive Donation</b>	Immediate	At end of donor’s life	At end of donor’s life	At end of income interest term	At beginning of creation of trust and continue through donor’s life or end of term	At end of donor’s life	Immediately or at end of donor’s life

This is for illustrative purposes. Consult your tax advisor or financial planner for the best plan for you.

# OTHER WAYS TO GIVE

What we have done for ourselves alone dies with us; what we have done for others and the world remains and is immortal.

– Albert Pike



## Making a Gift of Stock

To make a gift of stock, please use the following information

Clearwater Marine Aquarium, Inc.

Tax ID: 59-2086737

Contact: Scott & Stringfellow, LLC

Broker: Eric Morris

Account #: 4285-4950

DTC #: 0702

Phone: 800-476-3662

## Matching Gifts

Your business may offer a plan to match your personal contributions to CMA. This will allow your gift to be doubled, or even tripled! When sending in your donation, simply send along your signed company's matching gift form. We'll do the rest!

If you have questions about donating appreciated stock, matching gifts or other matters concerning charitable support, please contact our Planned Giving office at (727) 441-1790.





CLEARWATER MARINE  
AQUARIUM™

Contact our planned giving office at:

Clearwater Marine Aquarium, Inc.  
249 Windward Passage  
Clearwater, FL 33767  
(727) 441-1790

[www.SeeWinter.com](http://www.SeeWinter.com)



Donor Bill of Rights: To assure that philanthropy merits the respect and trust of the general public, Clearwater Marine Aquarium is proud to follow the Association of Fundraising Professionals Donor Bill of Rights.

A Florida non-profit 501(c)(3) organization

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For More Information