



*Mission: To strengthen the understanding, appreciation, and stewardship of land, water, and wildlife in the Ozarks.*

## Ozark Natural Science Center's Legacy Club Information for Financial Planners

### 1. Organization Details

- **Name:** Ozark Natural Science Center (ONSC) Legacy Fund
- **EIN:** 71-0705259
- **Address:** 1905 Madison 1305, Huntsville, AR 72740
- **Status:** 501(c)(3) tax-exempt organization

### 2. Gift Options & Tax Benefits

Estate planning vehicles include:

- **Bequests** (fixed dollar or percentage of estate)
- **Gifts of securities**, including appreciated stocks or bonds (deductible up to 30% of AGI, can avoid capital gains)
- **Life insurance policies** (naming ONSC as owner & beneficiary)
- **Retirement account assets** (IRA/401k beneficiary designation)
- **Real estate or tangible personal property** (subject to board approval)

All are federal tax-deductible; state deductions may apply.

### 3. Sample Bequest Language

"I leave to Ozark Natural Science Center, EIN 71-0705259, 1905 Madison 1305, Huntsville, AR 72740, the sum of \_\_\_\_\_ Dollars (or \_\_\_\_% of my estate) to be added to the ONSC Legacy Fund."

Donors may specify dollar amounts or estate percentages.

### 4. Legacy Club Purpose & Use of Funds

- The Legacy Club provides supplemental funding for:
  - Educational programming (including scholarships, camps, and public science engagement)
  - Campus care and maintenance
  - Operational endowment managed via Arkansas Community Foundation
- Distribution decisions are made by the ONSC Board, guided by fund-specific guidelines

## 5. Donor Recognition & Privacy

- Joining the Club incurs **no minimum gift amount**
- Donors are invited to an annual gathering with ONSC leadership
- Recognition is confidential; amount disclosed only if desired or upon death
- Donors are urged to inform ONSC upon including the Legacy Club in their plans; anonymity is honored

## 6. Administrative & Legal Notes

- Current donors can amend wills/trusts via codicil or trust amendment
- Securities gifts: full market value deductible, exceeds AGI limits carry forward up to 5 years
- Life insurance: immediate deduction for cash surrender value; premiums are deductible
- Real estate/property gifts are accepted with Board approval

## 7. Contact & Next Steps

### **ONSC Planned Giving Contact:**

Rose Brown, Executive Director  
rose.brown@onsc.us  
479-202-8340

Additional gift methods:

- Make a current gift online (select “Legacy Club”) via [www.onsc.us/donate](http://www.onsc.us/donate)
- Send checks payable to “Ozark Natural Science Center” with “Legacy Club” in memo
- For securities or other asset inquiries: info@onsc.us

## 8. Disclaimers

This document is informational and not a substitute for legal or tax advice. Donors and their planners should consult qualified advisors prior to making a planned gift.