



Merchants Exchange of Portland SCHOLARSHIP

PLANNED GIVING:

Are you passionate about the Maritime Industry? Planned giving is a simple way to benefit the students seeking careers in Maritime Affairs and/or International Trade, in order to ensure the future prosperity of the Maritime industry. There are several gift arrangements to choose from to make a lasting impact on the Merchants Exchange Scholarship Fund.



Leave a Gift in Your Will or Living Trust

Charitable Bequest Steps:

- 1) Contact Ashley Ros at 503-220-2092 or ros@pdxmex.com for additional information on bequests or to chat more about the different options for including Merchants Exchange Scholarship Fund in your will or trust.
- 2) Seek the advice of your financial or legal advisor/attorney.
- 3) If you include Merchants Exchange Scholarship Fund in your plans, please use our legal name and federal tax ID.
- 4) Share the following bequest language with your legal advisor/attorney as you make plans to include Merchants Exchange Scholarship Fund in your will or trust.
 - a) I hereby leave [percentage of estate/dollar amount/residue of estate/percentage of residue] of my estate/trust to Merchants Exchange Scholarship Fund, Portland, Oregon, to be used for the benefit of the scholarships in such manner as the Scholarship Fund board of directors my elect.
 - b) I hereby leave [percentage of estate/dollar amount/residue of estate/percentage of residue] of my estate/trust to Merchants Exchange Scholarship Fund, Portland, Oregon, for the following restricted purpose: _____



Make a Tax-Free Gift with an IRA

How it works:

- 1) If you are 70.5 or older, you can give any amount directly from your IRA to Merchants Exchange Scholarship Fund.
- 2) The transfer generates neither taxable income nor tax deduction, so you still benefit even if you do not itemize your tax deductions.
- 3) If you have not taken your required minimum distribution for the year, your IRA charitable rollover gift can satisfy all or part of that requirement.
- 4) The transfer may be made in addition to any other charitable giving you have planned.



Make a Gift of Securities

How it works:

- 1) Contact your financial advisor or broker to discuss donating securities/stocks to Merchants Exchange Scholarship Fund.
- 2) You can make a securities gift to Merchants Exchange Scholarship Fund via electronic transfer or by mailing the security certificate directly to the Scholarship Fund.
- 3) Mail security certificate and stock power form.
- 4) Merchants Exchange Scholarship Fund will issue the donor an official receipt for tax purposes.

With any gift, large or small, you are making a difference in students seeking careers in the Maritime Industry. Contact Merchants Exchange Scholarship Fund for other endowment opportunities or questions regarding planned giving at 503-220-2092 or scholarship@pdxmex.com.