

Legacy Giving Information

You can designate that your gift goes toward the following:

The Blue Bird Foundation: Gifts to this fund will provide a continuing and stable trust designated for the support and development of The Blue Bird Circle.

The Blue Bird Circle Pediatric Neurological Research Centers: Contributions directed to research centers will be used to support The Blue Bird Circle Developmental Neurogenetics Laboratory at Baylor College of Medicine, The Blue Bird Circle Rett Center at Baylor College of Medicine, The Blue Bird Circle Clinical Research Center at Texas Children's Hospital and The Blue Bird Circle Center for Advancing Treatments at the Duncan Neurological Research Institute at Texas Children's Hospital

There are a variety of ways you can make a gift. You can provide for The Blue Bird Circle or The Blue Bird Foundation in your will, as a beneficiary of retirement accounts such as an IRA, 403 (b), 401 (k), as a beneficiary of an insurance policy, or beneficiary of a bank account under the payable upon death provision.

Below are a variety of gift options and sample wording for your will:

1. Undesignated gift.

Example: *"I give and bequeath \$25,000 to the Blue Bird Circle in Houston, Texas to be used for its general purposes."*

Example: *"I give and bequeath ____ percent of my residuary estate to the Blue Bird Circle in Houston, Texas to be used by it for its general purposes."*

2. Foundation gift

Example: *"I give and bequeath \$25,000 to the Blue Bird Circle Foundation in Houston, Texas."*

Example: *"I give and bequeath ____ percent of my residuary estate to the Blue Bird Circle Foundation in Houston, Texas."*

3. Restricted gift:

Example: *"I give and bequeath \$25,000 to the Blue Bird Circle in Houston, Texas to be designated to the Blue Bird Research Fund."*

5. Contingent gift

Example: *"I give and bequeath _____ to my spouse, if he or she survives me. If my spouse does not survive me, I give and bequeath _____ to the Blue Bird Circle in Houston, Texas to be used by it for its general purposes."*

Additional Information:

The purpose of The Blue Bird Circle Foundation is to build and manage an endowment to provide long-term financial support to the programs of the Circle.

The Endowment funds are maintained in investment accounts which are managed by independent investment managers guided by the investment policy approved by the Board of Directors of the Circle and the Foundation, respectively. The performance objectives are to safeguard their assets and preserve the real purchasing power of their assets while earning investment returns to meet the Circle's operational requirements. The target performance objective is to seek returns on their investments that are in excess of the rate of inflation. The Circle and the Foundation seek to control risk and reduce volatility in the investment portfolio through diversification.

The information presented in this document is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.

For more information contact The Blue Bird Circle President at: president@thebluebirdcircle.com or The Blue Bird Circle Treasurer at circletreasuer@thebluebirdcircle.com