

Shark Research Institute
P.O. Box 40
Princeton, NJ 08540
USA

Attention: Ocean Legacy Society

Stewardship of the ocean and its resources is our legacy to future generations. By joining the Ocean Legacy Society you will acknowledge those who have preceded us and will help to ensure an even stronger Shark Research Institute for the next century of scientific research and ocean conservation.

We invite you to join the Ocean Legacy Society through a cash, endowed or planned gift. Please fill out the enclosed card and mail it to:

SHARK RESEARCH
INSTITUTE
P.O. Box 40
Princeton, NJ 08540
Telephone (609) 921-3522

You should consult your legal and tax advisors for an analysis of the benefits and tax implications of the various gift plans.

Gifts of real estate and personal property are subject to acceptance by the Board of Trustees.

THE
OCEAN LEGACY
SOCIETY
of

The Shark Research Institute



Established to honor and remember
the Members and Friends who have
contributed to building our
endowment.

WAYS TO GIVE

*The following is a summary of ways to give
That may maximize your objective of giving while
Minimizing the after tax cost of giving*

BUILDING THE ENDOWMENT FUND OF THE SHARK RESEARCH INSTITUTE

BEQUESTS – You may include the Shark Research Institute in your Will by making a bequest of a specific dollar amount, a percentage of your total estate, or the residuum remaining after all debts, taxes, expenses, and other bequests have been paid. You may also make specific bequests of stock, bonds, art, property or real estate.

TRUSTS – *Charitable Remainder Trusts (Unitrusts and Annuity Trusts)* – A unitrust pays a variable annual income to the Donor or a designated beneficiary, and an annuity trust pays a fixed annual income. In each case, after the death of the Donor or beneficiary, the Shark Research Institute would receive the remainder. These trusts provide tax savings, asset diversification and life income to you or your loved ones.

Charitable Lead Trusts – A Donor may make a gift by placing assets in a trust which designates that an amount of trust income be paid to the Shark Research Institute for a term of years. Once the trust terminates, the principal can revert to the Donor or to beneficiaries, typically children or grandchildren. A charitable lead trust offers gift and estate tax savings.

RETIREMENT PLANS – The Shark Research Institute may be named a beneficiary of a retirement plan, such as a 401 (K) or 403 (B), IRA, KEOGH, or SEP. Since these funds are tax deferred, the estate and income taxes (which may cumulatively approach 90%) may be reduced significantly by taking a charitable deduction for the portion given to the Shark Research Institute. Gifts of life insurance and the retirement plans may also reduce estate, income and inheritance taxes.

LIFE INSURANCE – If you own a life insurance policy and no longer require its protection, you may consider transferring ownership of the policy to the Shark Research Institute. You could also purchase a new policy and name the Shark Research Institute as beneficiary. Either gift will generate a charitable income tax deduction roughly equal to the cash surrender value of the policy on the date of the gift. You may take additional charitable income tax deductions for the premium payments that you subsequently make on the policy.

CURRENT GIFTS TO THE ENDOWMENT – Ways to give include gifts of cash, appreciated securities, and closely held stock or corporate matching gifts. Because of the simplicity in giving and the ease of delivery, cash is the most popular type of charitable gift.

In 2004, the Shark Research Institute will celebrate its 13th year as a leader in shark research and conservation. In the past 13 years, we have witnessed the determination, endurance, ingenuity, and triumphs of extraordinary people – our Members. Though the achievements of men and women like our Members, this has been the most remarkable and enlightening 13 years in the history of marine conservation.

The Shark Research Institute Ocean Legacy Society was established in 2002 to strengthen our financial foundation and endow our expanding programs.

You can help ensure the fulfillment of our objectives and the future of the Shark Research Institute by joining the Ocean Legacy Society . These endowment funds will be dedicated to supporting the work of the Shark Research Institute

The Shark Research Institute acknowledges those Members who make planned and/or cash gifts to the endowment. All Donors will be recognized, unless you wish to remain anonymous. As a member of the Ocean Legacy Society your name will be listed in the Ocean Legacy Society roster, the Annual Report and other Institute publications.

Your current cash gifts may be used to create a “Named Endowment” in your name or the name of someone you wish to honor or remember. As an example, depending on the size of your gift, a field station or special program may be named as you direct.

From time to time there will be special activities, receptions and events in appreciation of the generosity of Ocean Legacy Society Members. Beyond your financial commitment, Membership in the Ocean Legacy Society imposes no responsibilities upon any Donor.

Membership in the Ocean Legacy Society is not limited to Shark Research Institute Members; we welcome all who share our commitment to the ocean environment.

Gifts of Appreciated Securities – Giving long-term appreciated securities provides two income tax benefits: no tax is imposed on the appreciated portion of the gift (the capital gains), and the Donor will receive a charitable deduction based on the stock’s fair market value. Because the Donor can avoid the capital gains tax, it is usually more advantageous to contribute appreciated securities directly rather than to sell the securities and gift the proceeds of the sale.

Gifts of Closely Held Stock – Stock in a closely held corporation may also be given. Stocks that are not publicly traded require special planning and a qualified appraisal. We cannot value securities or other assets, but can refer you to a qualified appraiser.

Gifts of Real Estate – Your residence, vacation home, farm, commercial property, or undeveloped land may be deeded to the Shark Research Institute through a life estate contract. Through this type of planned gift, you or your beneficiary reserve the right to live on the property and/or receive any income generated by it for life. When the property is deeded to the Shark Research Institute you will receive an income tax deduction and avoid taxes on any capital gains. Estate and inheritance taxes may also be reduced. Gifts of Real Estate always involve special considerations that should be discussed in advance with us and with your legal and tax advisors.

Gifts of Tangible Personal Property – You may choose to consider making a gift of personal property such as vehicles, boats, paintings, sculpture or books. The Shark Research Institute will reserve the right to sell such items when timely, if use is not practicable and storage costs are excessive. You may be eligible for a fair market charitable income tax deduction without having to recognize the capital gain on any appreciation.

If you already have a Will, you may simply add a codicil, naming the Shark Research Institute as a beneficiary.

LEVELS OF PARTICIPATION

- Member—\$1,000 to \$9,999
- Contributor—\$10,000 to \$49,999
- Sponsor— \$50,000 to \$99,999
- Patron—\$100,000 to \$499,999
- Patron Circle—\$500,000 to \$999,999
- Benefactor - \$1,000,000 and above

The Ocean Legacy Society of The Shark Research Institute

*Membership in the Ocean Legacy Society requires
a minimum gift of \$1,000*

*Membership may in the form of an immediate gift
or a commitment for a future gift.*

1. I hereby enclose my check in the amount of \$ _____ payable to the Shark Research Institute.
2. I have remembered the Shark Research Institute in my Will or estate plans in a gift of an amount ranging between \$ _____ and \$ _____.
3. I hereby grant permission for my name to be listed on The Ocean Legacy Society Roster and other publications.
4. I wish to remain an anonymous Member of The Ocean Legacy Society.
5. I would like to talk to someone on The Ocean Legacy Society Committee about my interest in becoming a Member.

*We advise you to consult your estate planner for
assistance in selecting the most favorable program to
maximize your bequest while minimizing your tax bill.*

Name _____

Address _____

City _____ State/Province _____

Zip Code _____

Country _____

Daytime Telephone _____

Evening Telephone _____

Fax or Email _____

Signature _____ Date _____