

WAYS TO GIVE

GEORGE WASHINGTON'S MOUNT ★ VERNON

THE MOUNT VERNON LADIES' ASSOCIATION

There are many ways to give to the Mount Vernon Ladies' Association that can maximize your tax savings and further your impact.

No matter how you choose to give, your support will enable the MVLA to preserve, restore, and manage the estate of George Washington to the highest standards and educate visitors and people throughout the world about the life and legacies of George Washington, so that his examples of character and leadership will continue to inform and inspire future generations.

GIVE ONLINE

You can make a one-time gift or set up a monthly donation by credit card at www.mountvernon.org/give

Join or renew your membership at www.mountvernon.org/membership

GIFTS OF STOCK

Charitable tax advantages often make giving stock more beneficial than giving cash. By gifting appreciated stock from your investment account, you may be eligible to:

- Receive a charitable income tax deduction
- Eliminate capital gains taxes

To transfer shares of public stock, provide your broker with the following information:

BROKER: Charles Schwab & Co.
DTC NUMBER: Clearing 0164, Code 40
ACCOUNT NAME: The Mount Vernon Ladies' Association of the Union
ACCOUNT NUMBER: 6031-5048

MAIL A CHECK

To donate by mail, please make your check payable to **"The MVLA" or "The Mount Vernon Ladies' Association"** and mail it to us at:

**The Mount Vernon Ladies' Association
Development Department
PO Box 110
Mount Vernon, VA 22121**

WIRE TRANSFERS

To electronically transfer funds via wire or ACH, please provide the following information to your financial institution that will initiate the wire transfer.

BANK NAME: Burke & Herbert Bank & Trust Company
BANK ADDRESS: Alexandria, VA
ROUTING NUMBER: 056001066
ACCOUNT NAME: The Mount Vernon Ladies' Association of the Union
ACCOUNT NUMBER: 11000996
REFERENCE: Please provide your name, address, and zip code.

PLEASE NOTIFY US OF AN INCOMING WIRE OR GIFT OF STOCK
at 703.799.8647 or support@mountvernon.org, or complete the secure online form at www.mountvernon.org/wire-stock

ESTATE GIFTS

We invite you to consider making the Mount Vernon Ladies' Association part of your enduring legacy by including us in your estate plans and joining our **Ann Pamela Cunningham Society**.

You can do this by:

- **Beneficiary designation** of a financial account such as a retirement plan, life insurance policy, donor advised fund, charitable gift annuity, charitable trust, or other account.
- **Bequest in your will or trust** by inserting a provision containing our legal name and federal tax ID:

LEGAL NAME: The Mount Vernon Ladies' Association of the Union
ADDRESS: P.O. Box 110, Mount Vernon, VA 22121
EIN: #54-0564701

If you include us in your estate plans, please let us know. We would love to welcome and honor you as a member of our **Ann Pamela Cunningham Society**.

CONTACT US

If you have any questions, need assistance, or have interest in speaking further about charitable estate planning strategies for yourself or loved ones, please reach out!

support@mountvernon.org
703.799.8647

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GIFTS FROM RETIREMENT

Making gifts to the Mount Vernon Ladies' Association from traditional retirement accounts can allow you or your heirs to avoid paying income tax on distributions. In addition to designating **the MVLA or the Mount Vernon Ladies' Association** as the beneficiary of your retirement account, there are several advantageous ways to give from retirement accounts:

1. **Required Minimum Distributions (RMD):**

If you are over age 72 and are required to distribute funds from your retirement plan, you can satisfy your annual RMD and avoid paying income tax on the distribution by giving directly to the Mount Vernon Ladies' Association.

2. **Qualified Charitable Distribution (QCD):**

If you are over age 70 1/2, you can distribute up to \$111,000* per year from your IRA directly to the Mount Vernon Ladies' Association without paying income tax. This counts toward your annual RMD fulfillment.

**Based on 2026 limits.*

OTHER ASSETS AND GIVING STRATEGIES

The Mount Vernon Ladies' Association can accept a wide variety of assets, such as:

- **cryptocurrency**
- **real estate**
- **art**
- **life insurance**
- **private business interests**
- or help you set up **charitable vehicles like gift annuities or charitable trusts that provide income to you or loved ones.**

There are many ways to give that maximize your impact and tax savings.

The Mount Vernon Ladies' Association of the Union, Tax ID #54-0564701, a charitable corporation located in Virginia with the mailing address of P.O. Box 110, Mount Vernon, VA 22121