

# ESTATE GIFTS AND YOUR LEGACY



## A profound impact on the future of your community.

Giving through your estate can be a powerful expression of what you value and can have a profound impact on the future of your favorite nonprofit organizations. While estate giving can seem big, complicated, or even out of reach for many, that shouldn't be the case. In its simplest form, an estate gift is a planned gift given to an organization after your lifetime. Regardless of the size, a gift of this type is a beautiful way to leave your legacy and carry on the good work you began in your lifetime.

Estate gift plans provide valuable future support to an organization while allowing you to retain the flexibility to update your plans as circumstances change.

Below are two of the simple estate gift options. Your advisor will be able to work with you on additional ideas.

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### Charitable Bequest

A bequest is the act of giving assets to a nonprofit organization through a provision of an estate plan. While not required, it is recommended that prior to including an organization in your will or estate plan you talk with the organization about their needs, both current and future. This will ensure the designation is worded in a way that the gift can be carried out after your lifetime. Bequests can designate either a specific gift amount, a specific asset or a percentage of your estate and can be changed at your discretion.

### Example wording:

#### Percentage of Estate

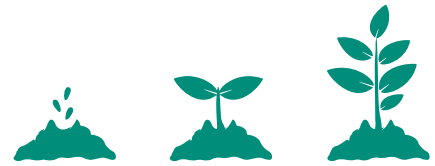
I hereby give, devise and bequeath to the ABC Nonprofit, a nonprofit corporation of the State of <STATE> (Tax I.D. #XX-XXXXXXX), located in <City, State> \_\_\_\_\_ percent (%) of the rest, residue and remainder of my estate as an *<unrestricted gift>* *<designated gift for X purpose>*.

#### Specific Amount

I hereby give, devise and bequeath to the ABC Nonprofit, a nonprofit corporation of the State of <STATE> (Tax I.D. #XX-XXXXXXX), located in <CITY, STATE>, the sum of \_\_\_\_\_ dollars as an *<unrestricted gift>* *<designated gift for X purpose>*.

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continued



## Beneficiary Designations

Another easy way to provide for an organization after your lifetime is as a beneficiary of all or part of your retirement plan, IRA or life insurance policy. This can be very tax efficient and done simply by including the organization's full name, tax identification number, and address on the beneficiary designation form. You may choose at a later date to enter into a separate agreement with the organization related to the use of this future gift.

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We support this nonprofit and the good work it does today, so it makes sense to continue that support through our estates. And it was really easy to plan a gift that is even larger than we can give now, because at that point we won't need the money anyway! Most of all we feel great about our plan and the good we will do through it.

—Liz and Glen

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**Talk to us today about what you can do to leave your legacy by supporting our mission through an estate gift!**