

Sample Language for Planned Gifts

Planning your legacy not only involves deciding how to allocate your assets, but also how to pass on what is truly important to you – *your* values, *your* ideals, *your* special story. Charitable gift planning is simple, flexible and transformational, offering opportunities to enhance your financial and estate plans while impacting future generations. These are suggestions and should be written or adapted by your legal counsel to fit your situation:

BEQUESTS

Simply include the following sentence in your will or trust: “I, _____ (name), of _____ (city, state, zip), give, devise and bequeath [the sum of _____] or [_____ % of the rest, residue, and remainder of my estate, both real and personal] to Saint Francis Foundation, of Cape Girardeau, Missouri, for its general support (or for the support of a specific fund or project).

CONTINGENCY GIFT

If (name of beneficiary _____) does not survive me, or shall die during the administration of my estate, or as a result of a common disaster, then I give to Saint Francis Foundation, of Cape Girardeau, Missouri, all of the rest, residue, and remainder of my estate, to be used for its benefit.

Note: Takes effect only if a primary intention can not be met.

LIFE INSURANCE

Life insurance offers flexibility in gift planning. For example, you can simply designate as primary, contingent or partial beneficiary: “Saint Francis Foundation, of Cape Girardeau, Missouri.” Or you may benefit from current tax advantages by either transferring ownership of an existing policy or taking out a new policy with with Saint Francis Foundation as owner and beneficiary.

RETIREMENT ASSETS

Designate as primary, contingent or partial beneficiary: “Saint Francis Foundation, of Cape Girardeau, Missouri.”

Note: The IRA Charitable Rollover allows individuals age 70-1/2 or older to transfer up to \$100,000 per year in charitable gifts, pay no tax on the distribution(s) and meet minimum distribution requirements.

OUR LEGAL NAME & TAX ID NUMBER

Your legal counsel will need this information when assisting you with your estate plan.

Legal Name: Saint Francis Foundation

Tax ID Number: 43-1111276

QUESTIONS

To discuss your options, please contact Saint Francis Foundation. We also recommend that your professional advisors be included in the conversation. We look forward to working with you, your family and your advisors to help you plan for tomorrow and receive maximum benefits today.

Please consider remembering Saint Francis Foundation in your will.

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