

Bequests and Estate Plan Gifts

A well-established plan made during your lifetime could help alleviate some of the negative impact taxes can have on assets that have grown significantly during your lifetime. A charitable bequest with a Donor-Advised Fund can benefit charities and help reduce your estate tax liability. If you are considering making a charitable gift at death, these estate planning tools can be extraordinarily useful. Before you make any changes to your estate plan, you should always consult your financial, legal and/or tax advisor.

Types of Bequest Assets to Consider:

- Wills & Estates
- IRAs, 401(k)s and Qualified Plans
- Life Insurance
- Charitable Remainder Trust

Benefits of a Donor-Advised Fund:

- Cost effective and easy to set up with a simple application
- You can leave a legacy in your family's name by naming the account (e.g., The William's Family Charitable Fund)
- A charitable deduction may help reduce your estate tax liability
- We can distribute gifts over time to several of your favorite charities
- Professional investment management from Eaton Vance, whose history dates to 1924

How to Set Up a Bequest:


An application must be completed prior to a Donor's passing and is kept for record keeping. The account will not be set up until we receive future funding. Please follow the below instructions for this type of contribution.

- **Step 1**
Complete a [Donor-Advised Fund Forms Booklet](#)
- **Step 2**
Change the beneficiary designation for your assets. A [Sample Language to Designate the U.S. Charitable Gift Trust as the Beneficiary of Assets](#) is provided.
- **Step 3**
Keep original application and beneficiary designations with your estate documents and fax a copy of the application to the Administrator.

To learn more, please contact Charitable Marketing at 800-836-2414.

I Want to View...

- [Donor-Advised Funds Forms Booklet](#)
- [Entity Form – Used with Forms Booklet when contributing as Corporations, Nonprofits, and other Entities.](#)
- [Donor-Advised Fund Performance Report](#)

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