



## Three Easy Ways to Make A Planned Gift

### Bequest

A gift from a will (or from a trust) allows you to make a future gift to your favorite Charlotte cultural organization. The following are samples of appropriate bequest language to share with your attorney:

**Specific bequest** - States a specific amount or asset amount. It may be a gift of cash, securities, real estate or tangible personal property.

Examples:

I give [*specific dollar amount or asset*] to ***Endowment For The Equestrian Aid Foundation (EIN 56-0546516)*** or its successor to be used for the unrestricted needs of the organization.

I give [*specific dollar amount or asset*] to the ***Endowment For The Equestrian Aid Foundation (EIN 56-0546516)*** for endowment.

**Residuary bequest** - Names Endowment for ***Endowment For The Equestrian Aid Foundation (EIN 56-0546516)*** as recipient of all or a percentage of the remainder of the estate after specific bequests have been fulfilled.

Examples:

I give [*X percent*] or [*the remainder*] of my residual estate to ***Endowment For The Equestrian Aid Foundation (EIN 56-0546516)*** or its successor for the unrestricted needs of the organization.

I give [*X percent*] or [*the remainder*] of my residual estate to the ***Endowment For The Equestrian Aid Foundation (EIN 56-0546516)*** for the purpose of endowment.

### Retirement Plan Assets

Retirement plan assets are often considered the attractive option for making a planned gift since these are among the most tax burdened assets in an estate. Making a future gift of retirement plan assets to your favorite equestrian assistance organization, such as ***Endowment For The Equestrian Aid Foundation***, may reduce estate tax liability, while allowing you to leave assets that receive more favorable tax treatment to other beneficiaries (i.e., your descendants).

To make a charitable gift of retirement assets, you need to complete a new beneficiary designation form naming the charity as a percentage beneficiary. When designating the charitable organization, please remember to include the complete organization name and address, as well as the organization's Employment Identification Number (EIN) to ensure accuracy.

***Endowment For The Equestrian Aid Foundation  
11924 W. Forest Hill Blvd., Suite 22-377  
Wellington, FL 33414  
EIN 56-0546516***

## **Life Insurance Policies**

You may use one or more whole life insurance policies to make a future gift to equestrian assistance organization, such as Endowment For The Equestrian Aid Foundation. To use a life insurance policy to make a gift, you could name the organization as a percentage beneficiary of a new or existing policy or transfer ownership of a new or existing policy to the cultural organization.

As with retirement plan assets, using a life insurance policy to make a charitable gift can be as simple as completing a new beneficiary designation form naming the charity as a percentage beneficiary. Again, please include the complete organization name and address, as well as the organization's EIN when naming it as the beneficiary, to ensure accuracy. If you chose to name Endowment For The Equestrian Aid Foundation as a life insurance beneficiary, for example, you would include the following information:

***Endowment For The Equestrian Aid Foundation  
11924 W. Forest Hill Blvd., Suite 22-377  
Wellington, FL 33414  
EIN 56-0546516***

*\*This document is not intended to be tax or legal advice and should not be relied on as such. Potential donors should consult with their legal and tax counsel to understand the implications of a specific charitable gift.*