

(Org Logo)

## Fact Sheet for Donors

**Legal Name:** \_\_\_\_\_

**Federal Tax Identification Number: 12-3456789**

**Contact:** Executive Director

**Address:** Mailing address

**Phone:** 555-555-5555

**Fax:** 555-555-5556

**Purpose:** (Description of organization, perhaps including mission and vision statements.)

**Additional Facts about organization:**

- People served?
- Long-term outlook?
- Government involvement?
- Funding sources?

**Recommended Language for Bequests and Testamentary Gifts:**

Donors wishing to designate a gift to XYZ Nonprofit Organization in their will or trust should use the following language:

“I wish to give (choose the appropriate language)  
(a specific dollar amount or a percentage of the estate)

(a specific number of shares of a specified security)

to XYZ Nonprofit Organization, Address  
Attention: Executive Director

Please call XYZ at (phone number) for additional information.



*Make a Difference in the Lives that Follow*

***Please remember XYZ in your will, trust, or other estate plans.***

(Org Logo)

**Use of Gifts: (optional)**

Donors making planned gifts (by bequest, beneficiary designation, or retained benefit gifts) or outright gifts may specify a purpose for their gift.

- ◆ If the gift is \$5,000 or more, the donor may create a named fund.
- ◆ Donors of gifts of \$5,000 or more may request that a special fund be created to fund a specific cause or area of interest within XYZ Nonprofit Organization.
- ◆ Donors may request that their gift go to address a specific department within XYZ Nonprofit Organization. Some examples:
  - Youth program 1
  - Youth program 2XYZ Nonprofit Organization will work with donors and their advisors to identify the purpose within XYZ that most closely meets the donor's wishes.
- ◆ Donors may request that their gift be used for general purposes of XYZ Nonprofit Organization.



**LEAVE A LEGACY®**

*Make a Difference in the Lives that Follow*

***Please remember XYZ in your will, trust, or other estate plans.***

(Org Logo)

## Ways to Give

Method	Benefits to Donor
• <b>Give Cash</b>	➤ Create income tax deduction for full amount of gift; Current gift.
• <b>Give Appreciated Stock or other assets</b>	➤ Create income tax deduction; Avoid capital gains tax on gain; Current gift.
• <b>Bequest of Cash</b> (name _____ in will or trust)	➤ Retain full use of assets during lifetime; Flexibility to change bequest; Estate tax savings.
• <b>Give Directly from your IRA</b>	➤ If you are at least 70½, the <i>Emergency Economic Stabilization Act of 2008</i> allows you to give up to \$100,000 (per spouse) directly from your IRA to _____, until 12/31/2009.
• <b>Bequest of IRA or other Retirement Plan</b>	➤ Retain full access / use of assets during lifetime; Flexibility; Estate tax savings; Income tax savings (due to nature of these tax-deferred assets).
• <b>Give Life Insurance Policy</b>	➤ Create income tax deduction for gift value and insurance premiums; Leverage of small annual premiums or one-time cash outlay.
• <b>Create Gift Annuity</b> (give cash or other asset in return for income for life)	➤ Receive high lifetime income (partially tax-free); Capital gain tax savings on appreciated assets; estate tax savings.
• <b>Give Personal Residence or Farm</b> (Retained Life Estate)	➤ Retain use of property for life; Receive partial income tax deduction; Estate tax savings.
• <b>Create Charitable Remainder Trust</b> (name _____ as a beneficiary)	➤ Receive lifetime income; Receive immediate income tax deduction; Avoid capital gains tax on sale of appreciated assets; Flexible payout structure; Flexibility to change beneficiary; Estate tax savings; Create a perpetual memorial in your name.

For more information, please contact \_\_\_\_\_ at  
XYZ Nonprofit Organization  
at 555-555-5555.



Make a Difference in the Lives that Follow

**Please remember XYZ in your will, trust, or other estate plans.**

(Org Logo)

## Information for Advisors

**Legal Name:** \_\_\_\_\_

**Federal Tax Identification Number: 12-3456789**

**Contact:** Executive Director

**Address:** Mailing address

**Phone:** 555-555-5555

**Fax:** 555-555-5556

**Purpose:** (Description of organization, perhaps including mission and vision statements.)

**Security Delivery Instructions:**

**Recommended Language for Bequests and Testamentary Gifts:**

Donors wishing to designate a gift to XYZ Nonprofit Organization in their will or trust should use the following language:

“I wish to give (choose the appropriate language)  
(a specific dollar amount or a percentage of the estate)

(a specific number of shares of a specified security)

the proceeds of my life insurance policy, (name of insurance company and policy number) (donor should also change the beneficiary designation on the insurance policy)

my Individual Retirement Account (name of investment firm and account number)  
(donor should also change the beneficiary designation on the account)

the remainder interest in my Charitable Remainder Trust (specific name of trust) (donor should also have attorney change the remainder interest on the CRT documents)

to XYZ Nonprofit Organization, Address  
Attention: Executive Director

Please call XYZ at (phone number) for additional information.



*Make a Difference in the Lives that Follow*

***Please remember XYZ in your will, trust, or other estate plans.***

(Org Logo)

**Use of Gifts: (optional)**

Donors making planned gifts (by bequest, beneficiary designation, or retained benefit gifts) or outright gifts may specify a purpose for their gift.

- ◆ If the gift is \$5,000 or more, the donor may create a named fund.
- ◆ Donors of gifts of \$5,000 or more may request that a special fund be created to fund a specific cause or area of interest within XYZ Nonprofit Organization.
- ◆ Donors may request that their gift go to address a specific department within XYZ Nonprofit Organization. Some examples:
  - Youth program 1
  - Youth program 2XYZ Nonprofit Organization will work with donors and their advisors to identify the purpose within XYZ that most closely meets the donor's wishes.
- ◆ Donors may request that their gift be used for general purposes of XYZ Nonprofit Organization.



**LEAVE A LEGACY®**

*Make a Difference in the Lives that Follow*

***Please remember XYZ in your will, trust, or other estate plans.***