

Sample Planned Giving Website Copy (Main page and Advisor page)

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Disclaimer: *This content is intended to provide general planned giving information. We do not provide specific legal, tax or investment advice and this information should not be used as a source of expert advice. Please encourage your donors to consult with their legal and financial advisors before making a gift to your organization. If you have a professional advisor connected to your nonprofit, we suggest you show them this copy and ask for input. Thank you.*

Main Planned Giving Page copy

Suggested urls YourNonprofitSampleName.org/PlannedGiving or
YourNonprofitSample.org/LegacyGiving

Planned Giving at (organization name)

Thank you for considering a charitable planned gift to (organization name). Below is some information about planned giving and other charitable opportunities at (organization name) for you and your advisors.

Bequests in a will or trust

Naming (organization name) is a wonderful way to create a legacy. Please share the following information with your attorney.

Sample Bequest Language

(include your organization's sample bequest language for an outright gift)

For contingent, residual and other types of bequest language, please contact:

Name

Phone

Email

Beneficiary Gifts

A very simple way to make a legacy gift is by naming a charitable organization as a beneficiary of a retirement plan, life insurance or brokerage account, for example. You can name (organization name) a full or partial beneficiary. Usually, all you have to do is fill out a "change of beneficiary" or TOD form online. In some cases, you can download a form and return it to your plan provider.

If you make a beneficiary gift, please let (organization name) know and you will be invited to join our (name of legacy society). All information regarding planned gifts are held in the strictest of confidence and you may choose to have your gift remain anonymous.

Retirement Plans

Your IRA, 401k, 403b, or other retirement plan is a practical way to leave a legacy. You can name (organization name) a full or partial beneficiary on a "change of beneficiary form." Did you know retirement plans left to individuals or family trusts are some of the most heavily taxed upon death -- up to 70% of your plan's value could be lost to taxes. As a 501(c)(3) charitable organization, (organization name) receives these same assets free of taxes.

Life Insurance

You can leave a significant legacy by donating a paid-up policy you may have outgrown, or by naming (**organization name**) as a beneficiary of an insurance policy. Life insurance paid to a charity is not subject to Federal estate tax and you may be able to receive an income tax deduction for your premium payments.

Bank & Brokerage Accounts

You can leave a significant legacy by donating a paid-up policy you may have outgrown, or by naming (**organization name**) as a beneficiary of an insurance policy. Life insurance paid to a charity is not subject to Federal estate tax and you may be able to receive an income tax deduction for your premium payments.

Charitable Remainder Trust

A charitable remainder trust allows you to provide income distributions for yourself or others while making a gift of the remaining assets to (**organization name**) when the trust ends. The income distributions may continue for the lifetimes of the beneficiaries, a fixed term of not more than 20 years, or a possible combination of the two.

Charitable Lead Trust

Annual gifts of income are first made to (**organization name**) and when the charitable lead trust ends, the remaining assets are distributed to you or your beneficiaries. All information regarding Planned Gifts is held in the strictest of confidence and donors may choose to remain anonymous.

Stock Gifts: Consider a charitable gift of appreciated securities

Contributing long-term appreciated securities is a charitable option and can provide special tax savings. In addition to receiving a tax deduction for the gift, the current value of the securities can be deducted regardless of how much they have appreciated. There is no capital gains tax on the profit.

Do you have a Donor Advised Fund?

If you have a donor advised fund (DAF) with a community foundation or charitable giving account with a financial institution like Fidelity, Vanguard, etc., please consider supporting (**organization name**), an eligible 501 (c) (3) nonprofit organization. You may be able to set up a recurring gift.

Direct Gifts from Retirement Plans

Are you 70 and a half (or better)? Think about making a charitable gift directly *from* your IRA to (**organization name**), an eligible 501 (c) (3) charitable organization. There are tax-smart reasons to do this and you will be helping support (**organization mission**).

The information contained on this webpage is for informational purposes only and is not intended to serve as legal or tax advice. For specific information about any of the above opportunities, please consult your tax adviser or attorney.

Nonprofit Name is a 501(c)(3) nonprofit organization and contributions are tax deductible to the fullest extent of the law.

[\(Advisor page cop on following page\)](#)

SEPARATE PAGE, SUGGESTED URL yournonprofit.org/Advisors

Attorneys, Accountants and Professional Advisors

Thank you for helping your client with their charitable plans. We appreciate your expertise and look forward to working with you. Below is some information about charitable opportunities with (organization name).

Information

Legal Name: Organization Name

Legal Address: Street # , City, State, Zip

Tax ID: 00-0000000

Contact: Name, phone, email

General Bequest Language

To include (organization name) in a will, please use the following suggested bequest language. For contingent and other types of bequest language, please contact name.

"I give (the sum of ____ dollars) or (all or ____ percent of the residuary of my estate) to Organization Name (Tax ID #00-0000000), for its general purposes and support."

Stock Transfer Information

Include your organization's instructions for stock transfers.

(End of Copy)

Disclaimer: This copy is provided as a complimentary resource to nonprofit organizations in the United States and is intended to provide general planned giving information. We do not provide specific legal, tax or investment advice and this information should not be used as a source of expert advice. Please encourage your donors to consult with their legal and financial advisors before making a gift to your organization. If you have a professional advisor connected to your organization, we suggest you show them this copy and ask for their input. Thank you.