



North Carolina & Virginia

Three Easy Ways to Make a Planned Gift

1) **Bequest**

A gift from a will (or from a trust) allows you to make a future gift to The Easter Seals UCP Horizons Foundation. The following are examples 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 the Easter Seals UCP Horizons Foundation (Tax Id#56-2172655) or its successor to be used for the unrestricted needs of Easter Seals UCP North Carolina & Virginia.

I give [specific dollar amount or asset] to the Easter Seals UCP Horizons Foundation (Tax Id#56-2172655) or its successor to endow the [named fund].

In the event my [spouse, daughter, son, friend – full name] shall predecease me, I leave their share to the Easter Seals UCP Horizons Foundation (Tax Id#56-2172655) or its successor to be used for the unrestricted needs of Easter Seals UCP North Carolina & Virginia or to endow the (named fund).

Residuary bequest - names the Easter Seals UCP Horizons Foundation as a 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 the Easter Seals UCP Horizons Foundation (Tax Id#56-2172655) or its successor to be used for the unrestricted needs of Easter Seals UCP North Carolina & Virginia.

I give [X percent] or [the remainder] of my residual estate to the Easter Seals UCP Horizons Foundation (Tax Id #56-2172655) or its successor to endow the [named fund].

2) **Retirement Plan Assets (IRAs)**

Retirement plan assets (IRAs) are often considered one of the most attractive options 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 the Easter Seals UCP Horizons Foundation may reduce estate tax liability, while allowing you to leave assets that receive more favorable tax treatment to other beneficiaries (i.e.: your children, grandchildren, etc.).

To make a charitable gift of retirement assets, you need to complete a new beneficiary designation form with your Retirement Investment Advisor which names the Easter Seals UCP Horizons Foundation as a percentage beneficiary.

When designating the Horizons Foundation, please remember to include the complete name and address of the Easter Seals UCP Horizons Foundation, as well as the Tax Id# to ensure accuracy.

Easter Seals UCP Horizons Foundation
5171 Glenwood Avenue, Suite 400
Raleigh, NC 27518
Tax ID# 56-2172655

3) **Life Insurance Policies**

You may use one or more whole life insurance policies to make a future gift to the Easter Seals UCP Horizons Foundation. To use a life insurance policy to make a planned gift, you could name the Easter Seals UCP Horizons Foundation as a percentage beneficiary of a new or existing policy.

As with retirement plan assets, when you use a life insurance policy to make a charitable gift it is as simple as completing a new beneficiary from naming the Easter Seals UCP Horizons Foundation as a percentage beneficiary. Again, please include the complete name and address of the Easter Seals UCP Horizons Foundation, as well as the Tax Id# to ensure accuracy.

Easter Seals UCP Horizons Foundation
5171 Glenwood Avenue, Suite 400
Raleigh, NC 27518
Tax ID# 56-2172655

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