



## LEAVING A LEGACY: Including Inheritance of Hope in your Estate Plans

### WILLS AND BEQUESTS\*

The simplest way to support Inheritance of Hope through a planned gift is to include the organization in your will.

The gift may be designated as cash, securities, real estate, or other personal property. Sample language for including an unrestricted gift to Inheritance of Hope in your estate plans is below.

**SPECIFIC BEQUEST:** An unrestricted gift through your estate for a specific amount of cash or property.

*I devise and bequeath to Inheritance of Hope, a nonprofit corporation incorporated in the State of New York and domiciled in the State of North Carolina at 547 Valeria Lane, Pisgah Forest, N.C. 28768, \_\_\_\_\_ (insert specific dollar amount or description of property) to be used to fulfill Inheritance of Hope's mission as determined by the Inheritance of Hope administration and governing board.*

**PERCENTAGE BEQUEST:** A gift of a percent of an estate.

*I devise and bequeath to Inheritance of Hope, a nonprofit corporation incorporated in the State of New York and domiciled in the State of North Carolina at 547 Valeria Lane, Pisgah Forest, N.C. 28768, \_\_\_\_\_ percent of my estate to be used to fulfill Inheritance of Hope's mission as determined by the Inheritance of Hope administration and governing board.*

**RESIDUAL BEQUEST:** A gift of whatever is left of an estate after other distributions.

*I devise and bequeath to Inheritance of Hope, a nonprofit corporation incorporated in the State of New York and domiciled in the State of North Carolina at 547 Valeria Lane, Pisgah Forest, N.C. 28768, \_\_\_\_\_ (enter the word "all" or a percentage) of the rest of my estate to be used to fulfill Inheritance of Hope's mission as determined by the Inheritance of Hope administration and governing board.*

*\*You may want to restrict your gift for a specific purpose, such as establishing a named endowment in honor of a loved one. If an honor/memorial gift is something you want to explore, please contact us to discuss specific wording. Working together, we can ensure your gift is able to be accepted and used for its intended purposes.*

## BENEFICIARY DESIGNATIONS

While the majority of planned gifts are made through a will, another equally accessible type of gift is through your retirement, investment accounts, or life insurance plan. The added benefit is you can designate the gift as early as today. Adding or changing a beneficiary designation is easy and free. Contact your plan provider and submit a change of beneficiary request. Many account administrators offer online access for beneficiary changes. If this is the right fit for your family, make a beneficiary designation to Inheritance of Hope, P.O. Box 90, Pisgah Forest, NC 28768, EIN 75-3243566.

## OTHER PLANNED GIFT OPTIONS

We each have our own unique philanthropic goals. Inheritance of Hope exists to help build and leave intentional legacies, including through your estate plans. Giving opportunities extend beyond wills and beneficiary designations. If you believe another planned gift vehicle may be of interest to you, we encourage you to contact us and also talk with your attorney, tax accountant, and/or financial advisor about various options that may be appropriate given your financial circumstances.

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## SHARING YOUR STORY

When considering including Inheritance of Hope in your estate plans, we encourage you to share with us the story behind your decision. Is your desire to partner with us through your gift grounded in your personal experience of the loss of a parent or loved one? Is your gift being made in honor of a loved one or close friend who had a transformational impact on your life? If so, how can we help make your gift as meaningful as possible for you and/or others?

Regardless of the reason, we hope you will, as part of your intentional legacy, provide a simple statement (from a few short sentences to several pages) about what motivated you to partner with us in such a generous and thoughtful way.

Please feel free to contact me at any time if you have questions or I can be of assistance.



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