

TOD GIFTS

Investing in Our Future



A Simple Way
to Support Our
Cause



DOING THE
MOST GOOD®

Do you own stocks, bonds or mutual funds? Would you like to make a gift to leave a legacy and support the charitable causes that matter most to you? If so, you may want to consider making a transfer on death (TOD) gift to our organization.

A TOD gift is a way to support the causes that you care about by naming us as the primary or contingent beneficiary of your investment account. When you pass away, the proceeds of your account go to help further our important work.

Benefits of Making a TOD Gift

There are a number of advantages to making a TOD gift.

- **Revocable** You retain complete ownership of your account while you are living. You can modify or revoke the TOD designation any time during your lifetime.
- **Simple** All you need to do is fill out a brief form provided by your financial or brokerage firm.
- **Inexpensive** There is no cost to file the form. In most cases, there are no legal fees because you can fill out the form yourself.
- **Avoids Probate** Your gift passes directly to us without going through the probate process.

"Making a TOD gift was simple to do, and it lets us continue to use our mutual funds to meet our needs in retirement. Knowing that our favorite charity will receive the mutual fund after both of us pass away is the icing on the cake. We couldn't be happier with this giving strategy!"



How To Make a TOD Gift

Making a TOD gift to support our cause is easy and straightforward. To make a TOD gift, follow these simple steps:

1. Contact your broker or investment manager regarding the stocks, bonds or mutual funds that you want to leave to charity.
2. Request a beneficiary designation form for making a transfer on death gift.
3. Complete the form, naming us beneficiary, and return the form to your broker or investment manager.



Is a Transfer on Death Gift right for you?

If you own stocks, bonds and/or mutual funds and want to remember us in your estate and legacy plans, then a TOD gift is worth considering.

Definitions

Beneficiary Designation

A gift of an account, such as a bank or retirement account, by the account owner that will take effect once the owner passes away. These gifts are easy to make using a form provided by the account custodian (the bank or brokerage house). This gift can be used to name a spouse, relative, other loved one or charity as a beneficiary of the account.

Bequest

An instruction or set of instructions that tells others how you want your assets to be distributed after you pass away.



May We Help You?

If you have any questions about making a TOD gift, please contact us. We would be delighted to assist you and answer any questions that you have.

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