



ESTATE & GIFT PLANNING

SAMPLE GIFT LANGUAGE FOR YOUR WILL OR TRUST

If you are creating a new will or trust, simply adding a codicil to a will, or amending an existing trust, the following sample language may be useful to you and your estate planning attorney. This is not a substitute for the language your attorney will incorporate in your will or trust. We urge you to secure the services of an attorney competent in estate planning in your state.

Note: Please contact us first if you prefer that we use your gift for a specific ministry or program.

PERCENTAGE GIFT A percentage estate gift involves leaving a specific percentage of your overall estate to support general ministry purposes.

I/We give and devise to InterVarsity Christian Fellowship/USA, located in Madison, WI, ____% of my/our total estate to be used to support its general ministry purposes.

RESIDUAL GIFT A residual estate gift comes to us after your estate expenses and other gifts are paid.

I/We give and devise to InterVarsity Christian Fellowship/USA, located in Madison, WI, all (or state a percentage) of the rest, residue and remainder of my/our estate, both real and personal, to be used to support its general ministry purposes.

SPECIFIC GIFT A specific amount of money or item of property may be given.

I/We give and devise to InterVarsity Christian Fellowship/USA, located in Madison, WI, the sum of \$_____ (or describe property), to be used to support its general ministry purposes.

CONTINGENT GIFT InterVarsity can be named as a contingent beneficiary.

If (insert name) is not living at the time of my demise, I give and devise to InterVarsity Christian Fellowship/USA, located in Madison, WI, the sum of \$ _____ (or describe property or include wording for residual gift), to be used to support its general ministry purposes.

Please provide the following information to your attorney:

Legal Name: InterVarsity Christian Fellowship/USA
Located in: Madison, WI
Tax I.D. Number: 36-2171714



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RETIREMENT PLAN BENEFICIARY DESIGNATION

You may name InterVarsity Christian Fellowship/USA as a beneficiary of your IRA or qualified retirement plan (such as a 401(k), 403(b), Keogh or profit-sharing pension plan). To do so, simply contact your plan custodian for a change of beneficiary form.

Passing such assets on to heirs can result in heirs paying income tax on the gift at their rate, and in your estate paying taxes (state and/or federal). Alternatively, naming InterVarsity as a retirement plan beneficiary and passing other less tax-burdened assets to heirs may mean less taxes for them and your estate. Be sure to consult your tax advisor regarding your circumstances.

OTHER BENEFICIARY DESIGNATIONS

InterVarsity can be added as a beneficiary of an insurance policy. Money held in brokerage and banking accounts can be directed to InterVarsity. Contact your insurance agent or the administrator of your financial account for procedures.