Simple Ways to Make a Difference

Including a bequest in your will or living trust is one of the most common and simplest ways to leave a lasting legacy. Here is language your advisor may use to include Easter Seals Greater Houston.

**Residual Bequest.** Bequeathing “what’s left” allows you to give to Easter Seals after providing for your friends and loved ones first.

“I give, devise and bequeath to Easter Seals Greater Houston, Tax I.D. No. 74-1238418, with principal offices presently located at 4888 Loop Central Drive, #200, Houston, TX 77081 [all or a portion – for example, fifty percent (50%)] of the rest, residue and remainder of my estate.”

**Specific Bequest.** With a specific bequest, you can bequeath a fixed amount of money or designated property.

“I give, devise and bequeath to Easter Seals Greater Houston, Tax I.D. No. 74-1238418, with principal offices presently located at 4888 Loop Central Drive, #200, Houston, TX 77081 [identify here a specific sum of money or a specific asset].”

**Percentage Bequest.** With a percentage bequest, you designate a percentage of your estate you want distributed to Easter Seals.

“I give, devise and bequeath to Easter Seals Greater Houston, Tax I.D. No. 74-1238418, with principal offices presently located at 4888 Loop Central Drive, #200, Houston, TX 77081 ______% [identify here a percentage of your estate].”

**Keep in Mind**

Odds are high that some or all of your assets are in one or more Individual Retirement Accounts (IRAs) you own. What’s often overlooked in estate planning is that assets in an IRA pass outside your will or living trust. Distribution of your IRA assets is governed by the beneficiary designation form you completed. As you consider your estate plans with your advisor, make sure you factor in how your IRA assets will be distributed.

Contact Kelly Klein 713-838-9050, kklein@eastersealshouston.org
From a tax standpoint, a qualified retirement plan makes an excellent candidate for a charitable donation. Because Easter Seals can receive IRA assets tax-free, every penny of your hard-earned and saved IRA dollars will help us carry out our mission.

**Bequest Q & A: Your Questions Answered**

Making a bequest to Easter Seals can feel like a big step. Fears about expense or about being locked into a decision can easily arise. To dispel some of those concerns we’ve put together a little question and answer session.

**Q.** I’m reluctant to tell you that I’m including you in my will or living trust because what if I change my mind?

**A.** *We understand that circumstances change. One of the best things about bequests is that you remain in control during your lifetime and can change your mind at any time.*

**Q.** I’m committed to seeing Easter Seals continue for generations to come but I want to make sure my children and grandchildren are taken care of, too. Is there a way to do both?

**A.** *There are many ways you can provide for your heirs and for Easter Seals. You can make a bequest of a percentage of your estate or a specific dollar amount to us, leaving the rest to your heirs. It can also be helpful to leave the most heavily taxed assets, such as retirement plan savings to us and less heavily taxed assets to loved ones. And, there are plans that would enable you to leave a legacy to Easter Seals while providing for a lifetime income to your loved ones. Give us a call. We’re happy to help you determine the right approach for you.*

**Q.** I’ve thought about including Easter Seals in my will or living trust but I’m not rich. I’m not sure my small gift will make a difference.

**A.** *Every gift makes a difference and is essential to our ability to help those in need!* Whatever you can give is greatly appreciated and will make the future brighter for individuals with a disability and their families.

**Q.** I want to make a bequest to Easter Seals but my will or living trust is already written and I don’t want to go to the expense of having it re-written.

**A.** *A codicil is a document that amends, rather than replaces, a previously executed will. It’s easy to do and costs relatively little. See your attorney about adding a codicil to your will or living trust.*

**Q.** What should I do next?

**A.** *Let us know if you need assistance in crafting your bequest or if you have already included Easter Seals in your estate plans. We want to have the opportunity to say thank you.*

This publication is not intended as legal or other professional advice. For assistance in charitable planning, always engage the services of a qualified professional.