

MOST PEOPLE FEEL BETTER WITH A PLAN IN PLACE

Your careful planning makes a big difference to Volunteers of America, Utah, and our most vulnerable neighbors.

HOW TO WRITE A BEQUEST

IDENTIFY THE BENEFICIARY

I give to Volunteers of America, Utah, a nonprofit corporation located at 1875 S Redwood Road, Salt Lake City, UT 84104

DESCRIBE THE GIFT

I give, devise, and bequeath to Volunteers of America, Utah, Salt Lake City, Utah, the sum of \$ _____
[or ____%, of my residuary estate; or an accurate description of securities or other property given]
to be used for the general purposes of Volunteers of America, Utah.

SPECIFY RESTRICTIONS (IF APPLICABLE)

This gift shall be used, both as principal and income, for [describe in broad general terms the desired purpose].



CONTACT US

FOR MORE INFORMATION
Contact Dan Benshoff at
dan@voaut.org



YOU CAN SAVE TIME AND MONEY BY TAKING THESE STEPS EVEN BEFORE YOU MEET WITH YOUR ATTORNEY



ITEMIZE YOUR ASSETS

Make a list of everything you own. Think about what type of property ownership applies. (Community property, joint tenants, trust property, etc.)

BE TAX WISE

A bequest is one of the easiest types of charitable gifts to make. It can also create tax advantages. If you give an asset like a traditional IRA (which carries a tax liability when given to an individual) to Volunteers of America, Utah, then your heirs won't owe any tax on it. Or, you could make VOAUT the beneficiary of the residual of your estate in case there's anything left over.

Whatever you do, be specific!

IDENTIFY YOUR GOALS

Do you want to provide for certain family members? Leave a charitable legacy? Be remembered in a specific way in your community?

Identifying your goals will help determine the right path forward for you, and the legacy you want to leave.



PUT THE DETAILS TOGETHER

Be prepared to hand your attorney a tidy folder or packet that has all the information they will need to draft your will.

The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples herein are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.



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of America®**

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