

Bequests and Estate Gifts

Please let us know if you have included The Kiwanis Foundation of Atlanta in your estate plans. You will be a part of our Legacy Society.

Gifts by Will or Revocable "Living" Trust

The most common form of deferred gift to support The Kiwanis Foundation of Atlanta is a bequest contained in a person's will or revocable (living) trust.

Sample Bequest Language

"I give and bequeath to The Kiwanis Foundation of Atlanta, in Atlanta, Georgia, the sum of xxx dollars. This gift shall be used to further the mission of The Kiwanis Foundation of Atlanta in such a manner as the Board of Trustees of the Foundation may direct."

You might choose to replace *"the sum of xxx dollars"* with one of the following:

"xx percent of my adjusted gross estate"

"all the rest, residue and remainder of my estate"

"xx percent of my residuary estate"

Codicil to Last Will and Testament

If your estate planning documents are up to date, you can simply draft a short codicil or amendment to the existing documents, using this or similar language:

"I, Sharon Smith, hereby amend my Last Will and Testament, executed on the 10th day of November in the year 2002. I direct that all provisions of that Will remain in effect but in addition direct that The Kiwanis Foundation of Atlanta, in Atlanta, Georgia, shall receive the sum of xxx dollars to be used to further the mission of the Foundation in such a manner as the Board of Trustees of the Foundation may direct."

Trusts

You may name the Kiwanis Foundation of Atlanta as the charitable beneficiary of your Charitable Lead Trust or Charitable Remainder Trust.

Gifts of Retirement Plans

Naming The Kiwanis Foundation of Atlanta as a primary or contingent beneficiary of a retirement plan (e.g. IRA, SEP, 401(k), 403 (b), ESOP, etc.) may enable you to make a larger gift

than you anticipated because income and estate taxes are not imposed when plan assets are distributed to The Kiwanis Foundation of Atlanta. If left to an heir, the plan assets are subject to income tax. Your retirement account's plan administrator (the company that manages the account) can help you designate The Kiwanis Foundation of Atlanta as a primary or contingent beneficiary on the plan's beneficiary designation form. (Please send The Kiwanis Foundation of Atlanta a copy of this form.)

Gifts of Life Insurance

You can name The Kiwanis Foundation of Atlanta as a primary or contingent beneficiary of a life insurance policy.