

CASA MYRNA

LEGACY GIFTS - MAKING A BEQUEST TO CASA MYRNA

A bequest made through your will or estate plan is a simple, compelling way to support the vital services Casa Myrna provides to women and children in crisis. Bequests made through wills and estate plans are the most common type of planned gift. You can change the beneficiary designations in your will, as well as the specific gift amounts and types, at any time during your lifetime. Charitable gifts through your will reduce the size of your estate. This can result in estate tax savings, both at the federal and state levels, if your net worth is above the current estate tax exemption limit.

"Including Casa Myrna in my estate planning was such an easy thing to do, it really required very little effort at all. It was worth what minimal time it took since I know the need for their services will persist long after I'm gone. I like knowing that I can play a small part in helping them continue their great work."

Christine Kenny, Boston

These are some of the ways you can include Casa Myrna in your will or estate plan:

Specific Bequest: "I give to Casa Myrna Vazquez, Inc., a Massachusetts nonprofit whose federal tax identification number is 04-2625710, its successors and assigns, the sum of \$ [or specify a percent of your estate, or describe a specific piece of property] to be used for the agency's general purposes."

Residuary Bequest: "I give the residue of my estate [or specify a portion of your estate], both real and personal, to Casa Myrna Vazquez, Inc., a Massachusetts nonprofit whose federal tax identification number is 04-2625710, its successors and assigns, to be used for the agency's general purposes."

Contingent Bequest: "If any of the above named beneficiaries should predecease me or disclaim any interest in [describe property], I give to Casa Myrna Vazquez, Inc., a Massachusetts nonprofit whose federal tax identification number is 04-2625710, its successors and assigns, all the property, both real and personal, which said beneficiary or beneficiaries would have received had they survived me, to be used for the agency's general purposes."

If you want to designate your bequest to a specific program or purpose at Casa Myrna please contact us when drafting your documents. This will ensure that your gift is directed to the program or service at Casa Myrna that resonates most deeply with you. Email dev@casamyrna.org or call (617) 521-0127 to speak to a member of the Development team.

OTHER WAYS TO MAKE A LEGACY GIFT

LIFE INSURANCE AND RETIREMENT PLAN

You can also choose to make Casa Myrna a beneficiary of a **life insurance policy or retirement plan**. This can be as simple as filling out a Beneficiary Designation Form, which you would request from your Plan Administrator. If you choose this form of giving, you will need our Taxpayer Identification Number, which is 04-2625710.

CODICIL

If you wish to Casa Myrna to an existing will or estate plan, you can accomplish this by adding a codicil, which will specify a gift amount /percentage/specific piece of property, as in the examples provided above.

None of the information above should be construed as legal or financial advice. When planning and writing your will or trust documents, we encourage you to discuss your goals and plans with an attorney or financial advisor experienced in estate planning.

Thank You!