



## Popular Ways to Leave a Legacy

**Charitable Bequest** – A simple, flexible and versatile way to ensure we can continue our work for years to come is a gift in your will or living trust, known as a charitable bequest. Below is sample language that can be used:

*“I **John Doe, of City, State, Zip**, give, devise, and bequeath to the Oral and Maxillofacial Surgery Foundation, of 9700 W. Bryn Mawr Avenue, Rosemont, Illinois 60018, Federal Tax ID 36-6111168, **(specific dollar amount or percentage of the estate or description of property)** for its unrestricted use and purpose.”*

**Codicil** – If you already have an existing signed will, you can contact your attorney to add a new provision to it. The sample language above can be used.

**Life Insurance** – Just name the Oral and Maxillofacial Surgery Foundation as a beneficiary to receive assets such as retirement plans and life insurance policies after you're gone. You simply fill out a form that is entirely separate from your will—which makes this approach an easy way to give.

There are three ways to give life insurance:

- ❖ **Name the Oral and Maxillofacial Surgery Foundation a beneficiary of the policy.** This gift is as simple as updating your beneficiary designation form with the policy holder. You can designate Oral and Maxillofacial Surgery Foundation as the primary beneficiary for a percentage or specific amount.
- ❖ **Make an outright gift of an existing policy.** You can name the Oral and Maxillofacial Surgery Foundation as owner and beneficiary of an existing policy. You may receive a federal income tax charitable deduction and reduce your future estate tax liability. If you continue to pay premiums on the policy, each payment is tax deductible as a charitable gift.
- ❖ **Make an outright gift of a new policy.** You can take out a new policy and irrevocably name Oral and Maxillofacial Surgery Foundation the owner and the beneficiary of the insurance contract. This method may be particularly attractive for the younger donor. Whether you make one single premium payment for the policy or pay annual premiums, each payment is tax deductible as a charitable gift.

**Retirement Plan Assets** – You can take advantage of this gift opportunity by naming Oral and Maxillofacial Surgery Foundation a beneficiary of your plan. All this requires is updating your beneficiary designation form through your plan administrator. You can designate Oral and Maxillofacial Surgery Foundation as a primary beneficiary for a percentage or specific amount.

**If you intend to include the Oral and Maxillofacial Surgery Foundation in your plans, please use our legal name and Federal Tax ID listed below, and send a copy of your documentation to us:**

<b>Legal Name:</b>	<b>Oral and Maxillofacial Surgery Foundation</b>
<b>Address:</b>	<b>9700 W. Bryn Mawr Avenue</b>
	<b>Rosemont, IL 60018</b>
<b>Federal Tax ID:</b>	<b>36-6111168</b>

**This information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.**