

# Wills and Trusts Gifts



Including the Women's Fund of the Blue Ridge in your will or trust is a meaningful way to create a lasting legacy for women and girls in the High Country.

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## Legal Name

Women's Fund of the Blue Ridge

## Address

895 State Farm Road, Suite 404-10, Boone, NC 28607

## Federal Tax Identification Number (EIN)

26-1346239

The Women's Fund of the Blue Ridge is a tax-exempt charitable organization recognized under Section 501(c)(3) of the Internal Revenue Code.

## Sample Bequest Language

Below is suggested language for common types of bequests. The following language illustrates common types of charitable bequests. Always consult your attorney or professional advisor when creating or updating your estate plans.

### Unrestricted Bequest

"I give, devise, and bequeath the rest, residue, and remainder of my estate (or \_\_\_ percent of my estate, or the sum of \$\_\_\_\_\_) to the Women's Fund of the Blue Ridge, located at 895 State Farm Road, Suite 404-10, Boone, NC 28607, Tax ID #26-1346239, for its general charitable purposes."

### Ensuring Your Gift Has Lasting Impact

If your bequest is designated for a particular purpose, we encourage the use of a flexibility clause to allow the Women's Fund of the Blue Ridge to respond to future community needs.

"If, in the judgment of the Board of Directors of the Women's Fund of the Blue Ridge, the designated purpose of this gift becomes unnecessary, impractical, or impossible to fulfill, the Board may direct the use of this gift to the area of greatest need, consistent with my original charitable intent."

## **Payable on Death (POD) or Transfer on Death (TOD) Designations**

Many financial accounts allow you to designate beneficiaries directly. By establishing a Payable on Death (POD) or Transfer on Death (TOD) designation on bank accounts, certificates of deposit, or brokerage accounts, you can transfer assets to a charity upon your passing.

To set up a POD or TOD designation, contact your bank or financial advisor and request their beneficiary designation form.

If you wish to name the Women's Fund of the Blue Ridge as a beneficiary, please use the following information:

**Women's Fund of the Blue Ridge**

**Tax ID #26-1346239**

## **Donation of Real Estate Through a Will**

Some donors choose to leave real estate as part of their estate plans.

Example language:

"I leave to the Women's Fund of the Blue Ridge the real property described as follows: (property description). I direct my Executor or Personal Representative to sell the above-described real property and distribute the proceeds to the Women's Fund of the Blue Ridge, Boone, North Carolina, Tax ID #26-1346239, for its general charitable purposes."

## **Codicil to an Existing Will**

If your estate plans are already in place, you may be able to add a charitable gift through a codicil, which is an amendment to your existing will.

Example language:

"I hereby amend my Last Will and Testament executed on the \_\_\_ day of , 20. I direct that all provisions of that Will remain in effect, but in addition I direct that the Women's Fund of the Blue Ridge, Boone, North Carolina, shall receive the sum of \$\_ to be used to support its mission of improving the lives of women and girls in Ashe, Avery, and Watauga counties.

## **Questions or Additional Information**

If you would like to discuss including the Women's Fund of the Blue Ridge in your plans or have questions about legacy giving, we would be happy to assist you.

 [info@womensfundoftheblueridge.org](mailto:info@womensfundoftheblueridge.org) |  828-264-4002

This information is provided for educational purposes only and should not be considered legal or financial advice. Please consult your attorney, tax advisor, or financial planner when making estate planning decisions.