

# Retirement Plan Gifts



You can support opportunities for women and girls in the High Country by naming the Women's Fund of the Blue Ridge as a beneficiary of your IRA, 401(k), or other qualified retirement plan. Retirement accounts are often subject to income taxes when passed to heirs. For this reason, many donors choose to leave retirement assets to charitable organizations while leaving other assets to their family members.

## How It Works

You may designate the Women's Fund of the Blue Ridge as a full or partial beneficiary of your retirement account by completing a beneficiary designation form with your retirement plan administrator. This type of gift is simple to arrange and can often be completed without changing your will or estate plan.

## Simple Steps

1. Request a Beneficiary Designation Form from your retirement plan administrator.
2. Name the Women's Fund of the Blue Ridge as a full or partial beneficiary of your IRA, 401(k), or other retirement account.
3. After your lifetime, the designated portion of your retirement plan will transfer directly to the Women's Fund of the Blue Ridge and be used to support programs that benefit women and girls across Ashe, Avery, and Watauga counties.

## Organization Information

Women's Fund of the Blue Ridge  
895 State Farm Road, Suite 404-10  
Boone, NC 28607

Federal Tax Identification Number (EIN)  
26-1346239

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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.