

# Advisor's Guide for Planned Giving

## **Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name Riverside Military Academy in your will or trust please use the following suggested language:

**Residual Bequest Language** — A residual bequest comes to us after your estate expenses and specific bequests are paid.

*I give and devise to Riverside Military Academy, located in Gainesville, GA, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).*

**Specific Bequest Language** — Naming Riverside Military Academy as a beneficiary of a specific amount from your estate is easy.

*I give and devise to Riverside Military Academy, located in Gainesville, GA, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).*

**Contingent Bequest Language** — Riverside Military Academy can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

*If (insert name) is not living at the time of my demise, I give and devise to Riverside Military Academy, located in Gainesville, GA, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).*

## **Gifts of Appreciated Securities:**

Please contact Ellen G. DeFoor CFRE for a stock transfer form.

## **Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:**

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to Ellen G. DeFoor CFRE.

Legal Name: Riverside Military Academy

Tax I.D. Number: 58-0616994

Incorporated In: Gainesville, GA

## **Note to Attorneys, Accountants and other professional Advisors:**

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call Ellen G. DeFoor CFRE, Vice President for Advancement at 770.538.2924 or edefoor@riversidemilitary.com.