MAKING A GIFT BY WILL OR OTHER ESTATE PLAN TO REACH BEYOND DOMESTIC VIOLENCE

A bequest is a simple and powerful way to support the work of REACH. By including REACH in your will or other estate plans, you will join a group of visionaries helping to ensure that REACH can bring life-saving and life-changing services to those impacted by domestic violence, now and in the future. A bequest or other gift from your estate may also help you to reduce or avoid estate taxes, and meet other personal and financial goals.

Giving a gift through your will of any amount is a meaningful gift, and is deeply appreciated by REACH.

We encourage you to share the information in this handout with your own qualified advisors. Please feel free to contact Brianna Nadelberg, Director of Development, at 781.891.0724 x109 or brianna@reachma.org with questions, or to notify us of your plans. We would be glad to help you and your advisors create a gift that meets your individual needs and goals. All conversations about your plans will remain strictly confidential.

Those who have included REACH in their plans via bequest, trust, retirement plan, life insurance policy or other arrangement, are warmly invited to membership in the **REACH Legacy Circle**. Anonymous members are welcome.

TYPES OF BEQUESTS, AND SAMPLE WORDING

General Bequest. A bequest for general purposes at REACH will help us apply your gift to our highest priority needs at the time it is received. **Your bequest may be expressed as a specific sum of money, a specific percentage of your estate, or a specific item or asset**. Here is an example of how a general bequest may be worded:

"I give, devise, and bequeath to REACH Beyond Domestic Violence, Inc., a Massachusetts charitable corporation, the sum of $________(or fixed percentage or description of specific asset), for the benefit of REACH Beyond Domestic Violence, Inc. for its general purposes."

Specific Bequest. If you intend to make a bequest for a specific purpose, such as to support specific programs and services, you may wish to use the following language:

"I give, devise, and bequeath to REACH Beyond Domestic Violence, Inc. a Massachusetts charitable corporation, the sum of $_______ (or fixed percentage or description of specific asset), for the benefit of REACH Beyond Domestic Violence, Inc. be used for the following purpose: (state the purpose). If in the judgment of the trustees of REACH Beyond Domestic Violence, Inc. it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose as near as possible to the designated purpose."

Residuary Bequest. If you intend to leave the residue portion of your assets after other terms of the will have been satisfied, you may wish to use the following language:

"All the rest, residue, and remainder of my estate, both real and personal, I give to REACH Beyond Domestic Violence, Inc., a Massachusetts charitable corporation, for its general purposes."

Contingency Bequest. If you wish to make a contingency gift so that REACH will receive a portion of your estate if your named beneficiary does not survive you, you may wish to use the following language:

"I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to REACH Beyond Domestic Violence, Inc., a Massachusetts charitable corporation, for its general purposes."

MAKING REACH A BENEFICIARY OF YOUR RETIREMENT PLAN OR LIFE INSURANCE POLICY

Making REACH a beneficiary of your retirement plan or life insurance policy is often as simple as naming the organization on a Beneficiary Designation Form, obtained from your plan administrator. Often such forms will ask you to provide the Tax Identification Number of a charitable beneficiary. REACH's tax ID number is 04-2735449.

ADDING REACH TO YOUR EXISTING PLANS BY CODICIL

A codicil is a simple instrument that allows you to add a charitable beneficiary such as REACH to your existing plans. For a sample codicil to review with your advisors, please contact Brianna Nadelberg, Director of Development.

INCLUDING REACH AS A BENEFICIARY OF YOUR TRUST

If you are considering including REACH as a beneficiary of an individual, family, charitable or other type of trust, some of the above sample wording may be useful to you and your advisors. If you have specific questions regarding a gift through a trust, establishing a charitable trust, or you would like to notify us of plans you have made, please contact our Development Office.

The **Tax Identification Number** of REACH is 04-2735449.

To discuss these or any giving options, please contact:
Brianna Nadelberg, Director of Development
at 781.891.0724 x109 or brianna@reachma.org

Thank you!

Note: None of the above is legal or financial advice and we encourage you to discuss your individual plans with your own financial advisors.