

# PLANNED GIVING

To effectively pursue the WBA Foundation's mission of meeting the legal needs of women and girls in the DC area, we must ensure the Foundation's long-term financial vitality. Planned gifts can help you support the Foundation and its mission in a significant way in the future without affecting your current income or savings.

Did you know that you can make a gift to the Foundation that costs you nothing during your lifetime, but that is priceless as part of the legacy you leave behind?

- Name the WBA Foundation as a beneficiary of an existing life insurance policy, a retirement or investment account, or a charitable annuity;
- Establish a bequest through your will or trust;
- Establish a charitable trust that supports the WBA Foundation and your loved ones

Your attorney or financial planner can work with you to identify other ways to support the WBA Foundation and provide tax savings while possibly leaving more assets to your heirs.

The growth of the WBA Foundation's endowment depends primarily on gifts from bequests. Please consider including the WBA Foundation in your estate planning and let us know if you have already named the Foundation as a beneficiary. Thank you!

If you would like to make a gift under your will or trust, please refer to the sample bequest language below:

## **A Specific Bequest of a Dollar Amount**

"I give, devise and bequeath to the Women's Bar Association Foundation, with headquarters currently located at 2800 Eisenhower Avenue, Suite 210, Alexandria, VA 22314, Federal Tax ID 52-1227859, the sum of \$\_\_\_\_, outright and free of trust, to be used for its general charitable purposes."

## **A Percentage Bequest**

"I give, devise and bequeath \_\_\_\_% of my residuary estate to the Women's Bar Association Foundation, with headquarters currently located at 2800 Eisenhower Avenue, Suite 210, Alexandria, VA 22314, Federal Tax ID 52-1227859, outright and free of trust, to be used for its general charitable purposes."

## **A Residual Bequest**

"I give, devise and bequeath the rest, residue, and remainder of my estate to the to the Women's Bar Association Foundation, with headquarters currently located at 2800 Eisenhower Avenue, Suite 210, Alexandria, VA 22314 Federal Tax ID 52-1227859, outright and free of trust, to be used for its general charitable purposes."

## **Payable/Transferable on Death Beneficiaryz**

If you wish to name the Women's Bar Association Foundation as a beneficiary of your retirement account, 401(K), Roth IRA, Traditional IRA, Thrift Savings Plan, life insurance, or brokerage account, please identify the WBA Foundation as follows:

Women's Bar Association Foundation  
2800 Eisenhower Avenue, Suite 210  
Alexandria, VA 22314

Federal Tax ID 52-1227859