

BENEFICIARY DESIGNATION GIFTS

A beneficiary designation gift is a simple and affordable way to make a gift to support Project Harmony. You can designate us as a beneficiary of a retirement, investment or bank account or your life insurance policy.

BENEFITS:

- Support the causes that you care about
- Continue to use your account as long as you need to
- Simplify your planning and avoid expensive legal fees
- Reduce the burden of taxes on your family
- Receive an estate tax charitable deduction

HOW IT WORKS:

1. To make your gift, contact the person who helps you with your account or insurance policy, such as your broker, banker or insurance agent.
2. Ask them to send you a new beneficiary designation form.
3. Complete the form, sign it and mail it back to your broker, banker or agent.
4. When you pass away, your account or insurance policy will be paid or transferred to Project Harmony, consistent with the beneficiary designation.

IMPORTANT CONSIDERATIONS:

If you are interested in making a gift, but are also concerned about your future needs, keep in mind that beneficiary designation gifts are among the most flexible of all charitable gifts. Even after you complete the beneficiary designation form, you can take distributions or withdrawals from your retirement, investment or bank account and continue to freely use your account. You can also change your mind at any time in the future for any reason, including if you have a loved one who needs your financial help.

HOW TO MAKE A GIFT:

1. Contact your attorney and/or financial advisor. Let them know you are considering a legacy gift to benefit Project Harmony.
2. Contact Project Harmony to receive a Legacy Giving Intent Form, so that we may properly thank you and recognize your gift. Reach out to Amy Chisholm, Senior Director of Development at achisholm@projectharmony.com or by phone at 531-301-5002.

Note: Information provided is general and educational in nature. It is not intended to be nor should not be construed as legal or tax advice. Please consult with your advisor(s) to determine the ultimate deductibility of your donations.