



Child Advocacy Center

11949 Q Street, Omaha, NE 68137
projectharmony.com

Gift of Financial Assets

Name Project Harmony as a beneficiary of your retirement plan, IRA, life insurance policy or other financial account. It's one of the easiest ways to create a meaningful legacy without revising your will.

Benefits

- Simple to set up — no need to amend your will or trust
- Retain full control and use of the account during your lifetime
- Flexible — you can change your beneficiary designation at any time
- Potentially avoid income and estate taxes that heirs might otherwise owe on these assets
- Leave a lasting legacy to support our work after your lifetime

Join Project Harmony's Legacy Society!



Your gift ensures that Project Harmony can continue providing critical services for generations to come.

How it works

You simply update the beneficiary designation form for your retirement plan (401(k), 403(b), IRA), life insurance policy, donor-advised fund, or bank or brokerage accounts (payable-on-death or transfer-on-death designations), naming Project Harmony to receive all or a percentage of the account after your lifetime. Because this gift passes directly to Project Harmony outside of your will, it does not require an attorney to update and can typically be completed by requesting a form from your plan administrator or account custodian.



How to make a gift

Contact your plan administrator, insurance provider, or financial institution to request a beneficiary designation form. Name "Project Harmony" as a full or partial beneficiary and return the form to your provider. Contact Kristie Arlt at Project Harmony to receive a Legacy Giving Intent Form, so that we may properly thank you and recognize your gift.



Contact

Kristie Arlt
Director of Major Gifts

Project Harmony
531.867.3092
karlt@projectharmony.com

Before making any planned gift, we encourage you to consult with your personal legal, tax, estate-planning, financial or investment advisor to ensure that any gift you are considering is appropriate for your individual circumstances. We are happy to work with you and your advisors to provide any information needed. If you or your advisor have questions, please let us know—we are here to help.

To the extent you want to identify Project Harmony as the recipient of a charitable gift or bequest, we recommend that you name "Project Harmony, Omaha, Nebraska." To eliminate confusion, you may also wish to include Project Harmony's Tax ID number 47-0789054.