



SAMPLE GIFT LANGUAGE FOR YOUR WILL OR TRUST

A gift to IMANA in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future generations. A bequest: is easy to arrange. will not alter your current lifestyle in any way. can be easily modified to address your changing needs.

Residual Gift Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give, bequeath and devise all (or ____ percent) of the rest, residue and remainder of my estate to IMANA, a corporation of the State of Virginia, located in Alexandria, Virginia, for the general and educational purposes of said Corporation.

Specific Gift Language

Naming IMANA as a beneficiary of a specific amount from your estate is easy:

I give, bequeath, and devise to IMANA, a corporation of the State of Illinois, located in Lombard, Illinois, the sum of \$_____, (or ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (name of program or academic area.) In the event the need to support _____ no longer exists, IMANA shall be and hereby are authorized to use this bequest for a purpose in keeping with the spirit of this gift in the best interest of the humanitarian relief.

Contingent Gift Language

IMANA 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 IMANA (Tax ID #36-4166125), located in Lombard, IL, 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).

Retirement Plan Beneficiary Language

You may name IMANA (Tax ID #36-4166125) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming IMANA as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming IMANA as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support IMANA free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change of beneficiary form your plan administrator. When you are done, please return the form to your plan administrator and notify IMANA. We can also assist you with the proper language for your beneficiary designation to IMANA.

Customized Language

If you or your attorney would like IMANA to provide you with customized beneficiary language that is specific to your goal and interest, please contact us.