Organization logo, address, phone, website.

## Beneficiary Designations

You can make a beneficiary designation in support of **ABC Organization**. To do so, contact the financial institutions that hold your assets and complete a beneficiary designation form. The following are some common assets for this type of gift:

### Retirement Funds Gift

You can reduce or even eliminate tax liabilities on your retirement plan by naming ABC Organization as a direct beneficiary. The entire amount of your IRA, 401(k) or other retirement accounts may be taxed if you leave them to your heirs. Instead, consider giving them less tax-burdened assets like real estate and stock, and use retirement assets to create your legacy gift to ABC Organization.

### Life Insurance Policy Gift

If you have a life insurance policy that has outlasted its original purpose, you can use it to fund a legacy gift while enjoying tax savings during your lifetime.

### Savings Bonds

When you redeem savings bonds, you (or the person to whom you leave your bonds) will owe income tax on the appreciation. Since ABC Organization is a tax-exempt organization, 100% of your gift of savings bonds will support our mission to strengthen our libraries.

### CDs, Bank Accounts, and Brokerage Accounts

Naming ABC Organization as the beneficiary of a certificate of deposit, a checking or savings account, or a brokerage account is one of the easiest ways to positively impact our organization.

### Donor Advised Fund Residuals

The final distribution of contributions remaining in a donor-advised fund is governed by the contract you completed when you created your fund. Please consider naming ABC Organization as a successor of your DAF or a beneficiary of your fund value.